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Cabinet Explorer Client User Guide

23/03/15

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Document History

The following table shows the change history for this guide.

Date	Version	Description	Author
04/03/2015	32	Initial draft	Paul Johnson

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Document Details

Purpose

This document describes the features and use of Cabinet Explorer, a Document Management System for the management and control of electronic and physical documents.

Scope

The scope of this document is limited to Cabinet Explorer (CE) up to and including version 3.1.2. It is assumed that readers of this document are familiar with Windows features and usage.

Cabinet Explorer Overview

The Cabinet Explorer Document Management System is designed to reduce the cost, time and workload involved in maintaining a document archive. It has the look and feel of Windows Explorer, which helps users to feel familiar with its interface.

Cabinet creates a structure for document creation, storage, retrieval, revision, approval and 'issuing', and controls the processes involved, through **workflows**. It controls the types of folders that can be created, the types of documents that can be created or imported into them, the document numbering scheme, and searches can include keywords by assigning metadata to them.

Cabinet records an event history – who was involved and when it happened, and allows users to perform the operations that the configuration allows. It does this by requiring users to log in, by assigning them to groups of other users and giving the groups permissions to carry out defined sets of operations.

As an example of a document revision process, a typical user might log in to the system and finish working on a document. The user then uses the Workflow menu to change the document's workflow stage and nominate another user to verify the document. With the CWP optional module, the system automatically sends an email to this user, which includes a hyperlink to the published document. The verifier sees the document listed in their *Documents for My Attention* folder, views the document and if they are satisfied, they use the workflow menu to go to the next stage, choosing an authoriser. The system sends an email to the authoriser. The authoriser sees the document listed in their 'Documents for My Attention' folder, views the document and if it is authorised, the next stage is for the system to re-publish the document with the names and dates of verifying and authorising.

A **Template** is a file or document that determines the basic structure of the document being created. In the case of a word processor, the Template contains document components and settings, such as entries, fonts, key assignments, menus, page layout, special formatting, tags and styles. In the case of a CAD package, this could be the Prototype Drawing (AutoCAD) or Seed File (MicroStation) defining A0-A4 drawing layouts, with their predetermined Attribute / Tag data.

An **Intent** can be best thought of as a combination of the "type" of document to be created (e.g. "Report", "Drawing", "Email", etc…), and the "discipline and/or department and/or function" for which the document is intended (e.g. "Financial", "Civil", "Company/Business Wide", etc…). For example, the intent of a report being produced for the Financial department, would be "Financial > Report".

Intents are used by Cabinet to allow selection of the correct document template for the selected folder, for creation or import. The Intents that can be chosen in this folder are determined by its **Folder Type** and/or the folder itself.

An **Instance** is a Cabinet Explorer database. Several instances could exist in a Cabinet Explorer system, located at different physical locations, for example.

A **Context** is a configuration grouping. Departments could have their own Context, for example. Unless a user is granted administrator privileges, their account, group Cabinet Explorer Client User Guide Version 30 Version date 13/3/13 Page 8 of 180 membership and roles in workflows are context-specific. Cabinet Explorer licencing is also organised by Context.

Note that an Instance can only have one Context, but a Context can have many Instances.

Interface Features

This section is an overview of the basic features of the Interface. The next section describes how to use the interface to carry out various tasks, and includes a more detailed description of the Cabinet Explorer features used to accomplish them.

Note that any features available to individuals are user dependent based on the configuration that has been set up for that user. The features shown in the screen images and descriptions that follow apply to a user who is logged in as a Systems Administrator.

Click on the Cabinet Explorer icon to start the application.

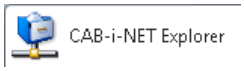


Figure 1.

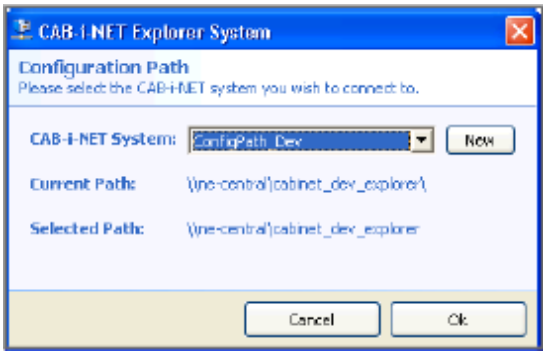


Figure 2.

If the *Configuration Path* form is displayed, either:

- Click *OK* to proceed using the current (i.e. previously selected) Cabinet configuration path.

Or

- Select an alternative configuration path (if applicable) from the drop-down list and click OK.

In version 3.0.0 and higher, Cabinet Explorer supports database replication so that, depending on the network characteristics, a local SQL server can be selected to optimize read operations such as navigation through folders. Each replicated system is known as a *Location*.

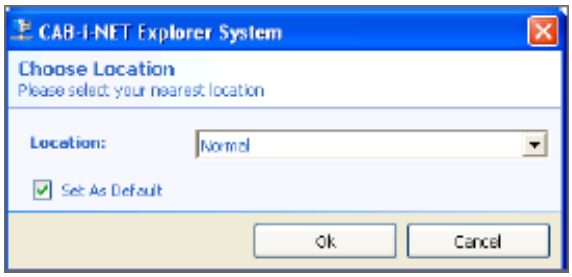


Figure 3.

If the *Choose Location* form is displayed, select the name of the required location from the drop-down list.

Default Location

If this location should be selected by default when logging in to Cabinet Explorer, tick the *Set as Default* checkbox. This setting can be overridden in one of two ways, depending on configuration:

- If the Configuration Path form is displayed, hold down the *Shift* key before clicking the *OK* button.
- If the Configuration Path form is not displayed, hold down the Shift key before clicking the Cabinet Explorer icon.

Login

When the required location is selected, click OK to display the login form.

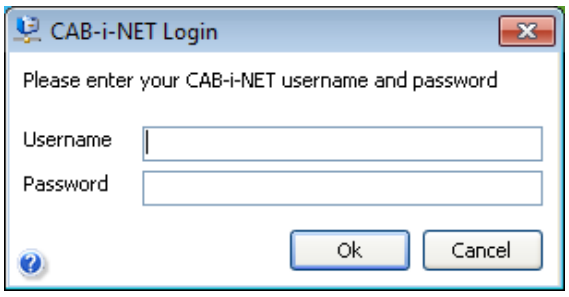


Figure 4.

- Enter your *Username.*
- Enter your *Password.*
- Click the *Ok* button to access the system.

The Cabinet Explorer interface is shown below. The main features are described in the following pages.

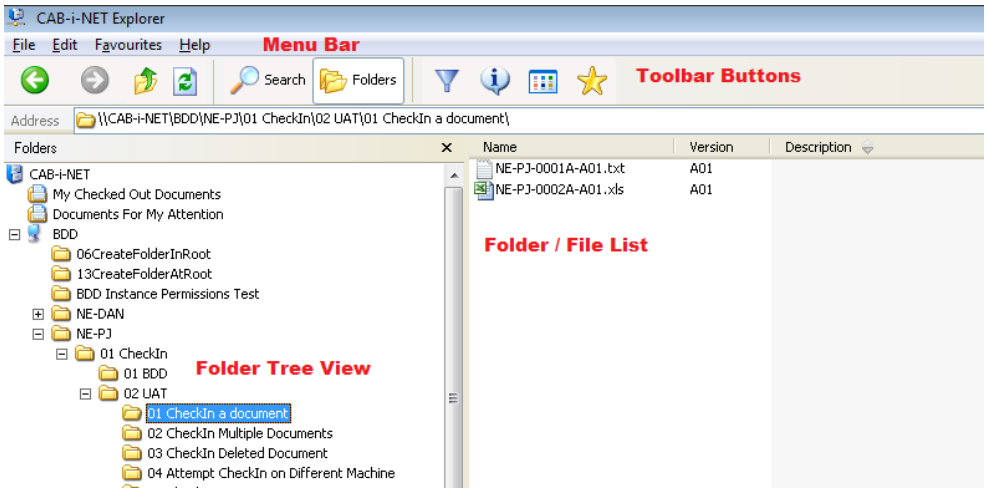


Figure 5.

Cabinet Explorer Menu bar

The menu bar is positioned near the top left corner of the screen.

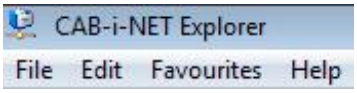


Figure 6.

File

When you click on the File menu option the following options are available to you.

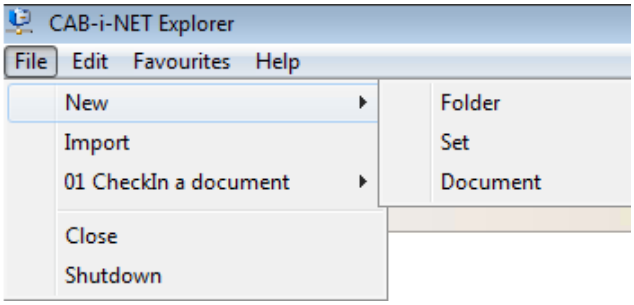


Figure 7.

New

Create a new folder or document. When a folder is created, a type is allocated to it, which determines the types of document that can be created in that folder.

Import

Import an existing document file. The types of files that can be imported are determined by the Intents that have been set up for the folder that the document will be imported to.

Close

Close, closes down the Cabinet Explorer window but keeps the session open/running.

Shutdown

When the shutdown option is selected Cabinet Explorer closes down and the session ends.

Edit

Folders or documents can be selected by clicking on their name in the files / folders list, so that they are highlighted. The standard Windows methods apply to the selection of multiple folders or files.

Ctrl + left mouse key	Select multiple individual folders / files
Shift + left mouse key	Select a continuous range of folders / files between those selected.

Additionally, the edit menu gives you the following options:

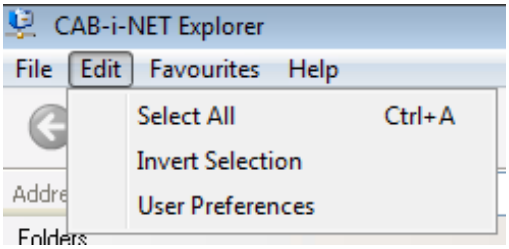


Figure 8.

Select All	Select all folders or documents in this folder.
Invert Selection	Select all that are not currently selected.
User Preferences	Display the User Preferences form to set default actions.

Favourites

The favourite's menu option allows you to add any folders from within Cabinet Explorer system and save them as favourites.

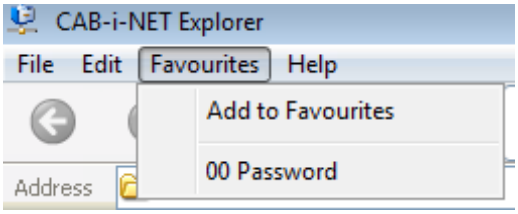


Figure 9.

Help

The help option provides information about the software version of Cabinet Explorer.

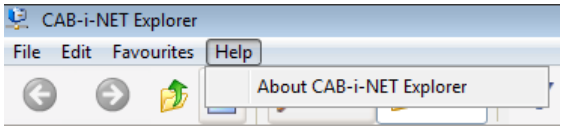


Figure 10.

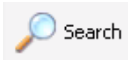
When you select the About Cabinet Explorer option the following window is displayed.

About CAB-i-NET Explorer
CAB-i-NET Explorer (3.3.0)
© 2003-2015 tsaADVET limited
All rights reserved
Warning: This computer program is protected by copyright law and international treaties
Unauthorised reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law
Ok

Figure 11.

Toolbar Buttons

Many of the toolbar buttons remain selected when they are clicked, and are turned off by clicking on them again. When selected, they are highlighted, with a border.

Button	Icon	Function
Back		Click the button to go back to the previous folder. Repeat if the previous folder cannot be selected because it has been deleted. The button is greyed-out if no previous folder can be selected.
Forward		Click the button to go go forward to the folder selected after the current folder. Repeat if the next folder cannot be selected because it has been deleted. The button is greyed-out if no folder can be selected.
Up		Click the button to move up a level in the folder structure.
Refresh		Refresh the screen to show the current state of the system. This is useful if the information has been modified since it was last displayed.
Search		When the Search button is clicked, The *Saved Searches* pane is shown, and the Filter button is enabled (see below). If a search has been saved for future re-use, it can be selected in this pane. The saved search Criteria will be shown and these may be edited if required. To perform the search, the *Run Search* button is clicked (see Search Criteria toolbar below).
Folders		Click the folders button to open the folder tree view. Clicking on a folder expands the tree to show subfolders in the tree view and in the folders / files list.
Filter		Click the Filter button to show the Search Criteria toolbar and the Add Criteria… button.
Information		Click the Information button to view the message pane, below the folders / files list.
Thumbnail View		Click to toggle thumbnails of image files on /off. The thumbnails appear in place of the file type icons in the document list.
Favourites		Click to add / remove the selected folder to / from the Favourites list. Refer to Using Favourite Folders for further details.

Search Criteria toolbar

Button	Icon	Function
Create a New Search		Click the button to clear a previously entered search criteria and results, if applicable. Start entering new criteria by clicking the *Add Criteria…* button (see below).
Save the Search		Click the button to save a search for future re-use. The new search will be shown in the Saved Searches pane. The default 'New Search' name can be replaced with a more meaningful name and press Enter. A search can also be renamed by right-clicking it and selecting *Rename* from the menu. To delete a saved search, right-click its name, select *Delete* from the menu and confirm the deletion.
Add Criteria		Click the *Add Criteria* button or click the text field below, labelled *Add Criteria…* and select options from the menus shown (see *Add Criteria… button* below).
Search Subdirectories		Click the button to enable or disable searching within subdirectories.
Run Search		Click the button to perform a search. The search results are listed in the folders / files pane.

Add Criteria…button

When the button is clicked, a selection of search criteria will be listed for selection in menus. All fields shown with '…' can be clicked to allow further selections to be made. Search Criteria can be deleted by left-clicking or right-clicking them and clicking *Remove* from the menu.

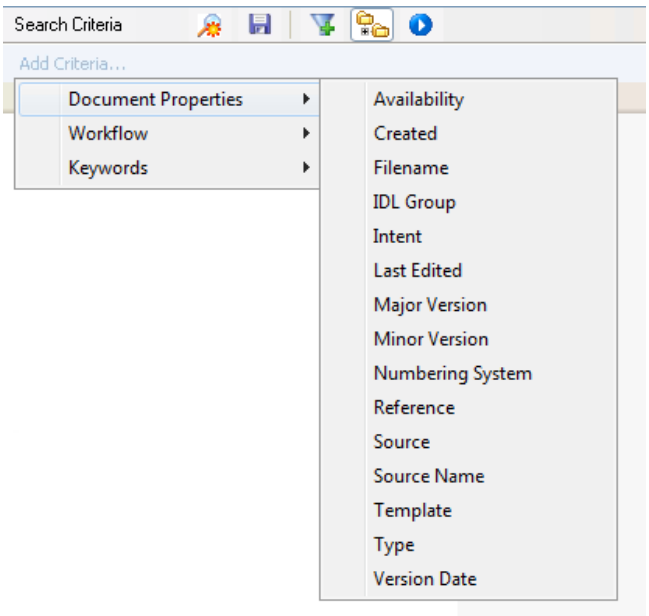


Figure 12.

An example of multiple search criteria is shown below:

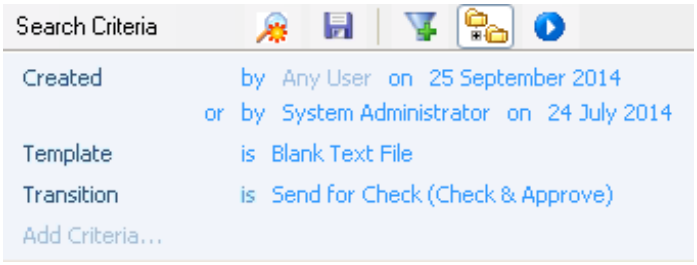


Figure 13.

Address Field

Type the folder or file address into the address field, or alternatively use the folder tree to navigate.

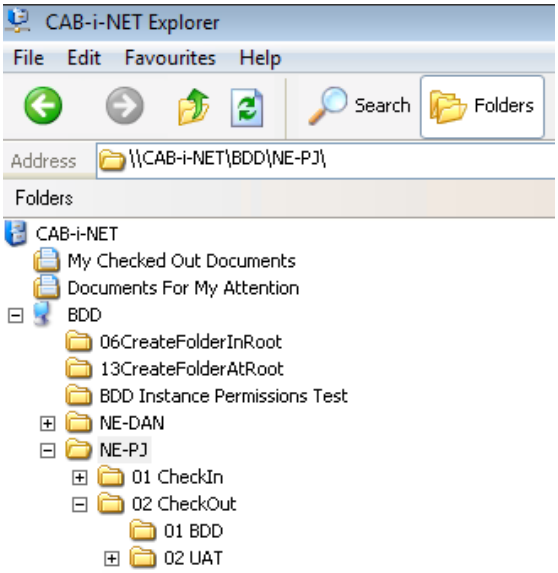


Figure 14.

Name	Icon	Description
Cabinet Explorer		The Cabinet Explorer root folder.
My Checked Out Documents		Click on My Checked Out Documents to list the entire user's checked out documents.
Documents for My Attention		Click on *Documents For My Attention* to list all of the documents for which a workflow transition has been performed, nominating the user to perform an action.
<Instance Name>		Click the '+' button to view the folder structure for this Instance.

Folder / File list

Double-click to open a Folder or file in this pane. Alternatively, click to highlight it and right-click to display a menu. The name of each document is displayed with other information for reference, arranged in columns. The displayed columns can be selected by clicking on the folder in the folders pane, right-click and selecting *Properties, Details View*.

Alternatively, the number of columns displayed can be set up by right-clicking in the grey column title area, and ticking the required columns (see below). Click and drag a column name to change its position, and click and drag a column separator line in the grey area to change its width.

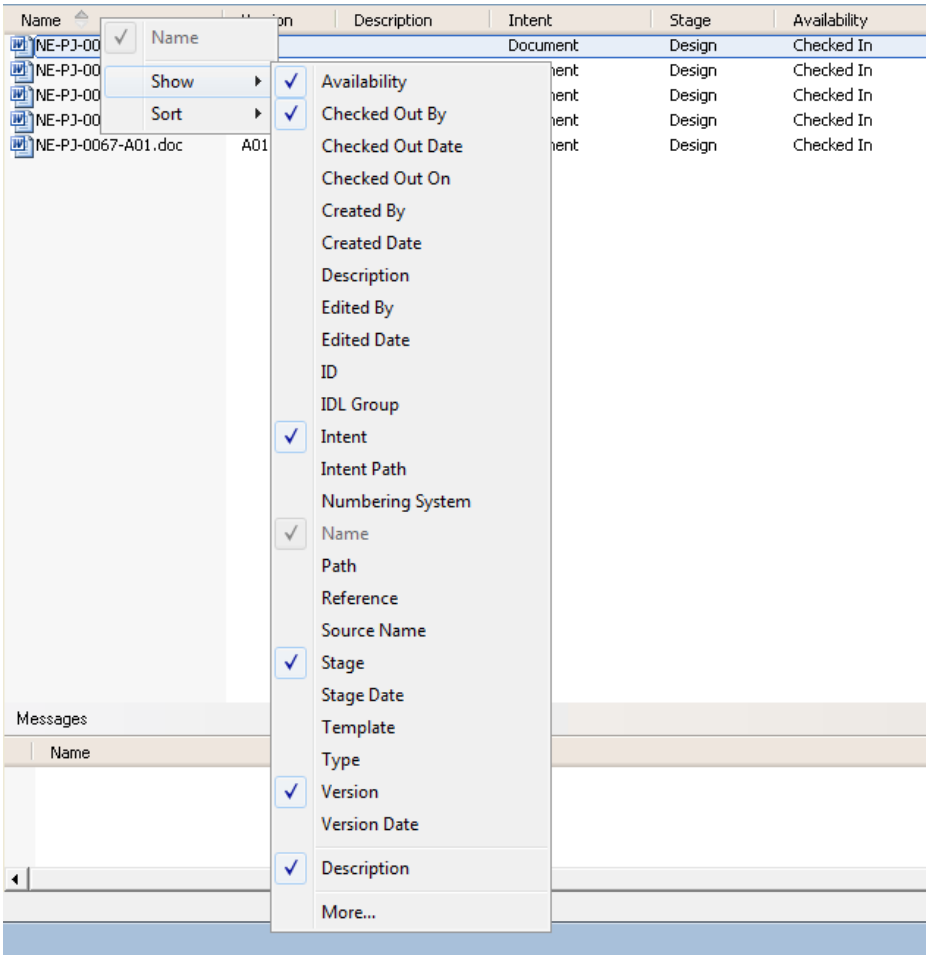


Figure 15.

Click the *Thumbnail View* button to show a thumbnail image of each document, instead of the file type icon. It displays the thumbnail images and depends on each document's file type, such as jpg files.

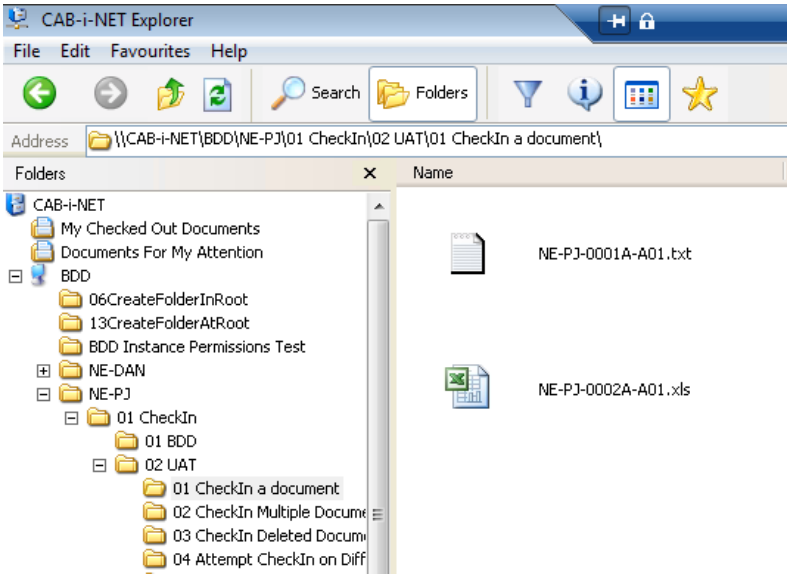


Figure 16.

Note
For optimal speed, when documents are changed or new documents are added to the selected folder, their thumbnail view is not shown. To update the thumbnail view, click the *Refresh* button or turn the *Thumbnail View* off and on.

Select a document by clicking on it, so that it is shown with a blue background. Alternatively, navigate up and down the list using the up and down or left and right arrow keys. If Thumbnail View is selected, use of the left and right arrow keys also causes the default task to be performed on the selected document (Open or Preview, depending on the stage). The default task is shown in bold text in the document right-click menu.

Folder list view menu

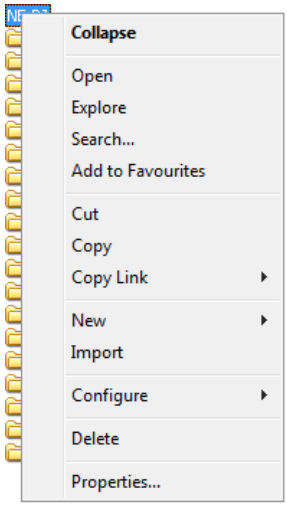


Figure 17.

Open	Open the folder to view its contents.
Explore	Open a new Cabinet Explorer window with the Folders button enabled.
Search	Open a new Cabinet Explorer window with the Search button enabled.
Add to Favourites	Add the selected folder to the Favourites list, for rapid navigation. See page 60.
Cut	Cut the selected folder so that it can be pasted to a new location, with its subfolders and documents if applicable. See page 66.
Copy	Copy the folder structure, so that it can be pasted to another folder. See page 61.
Copy Link	Copy a link to the folder to the clipboard, or create an email with the link included.
Delete	Delete the selected folder - confirmation is required.
Properties	Display the Folder Properties form.

Folder Properties

Here is the folder properties form.

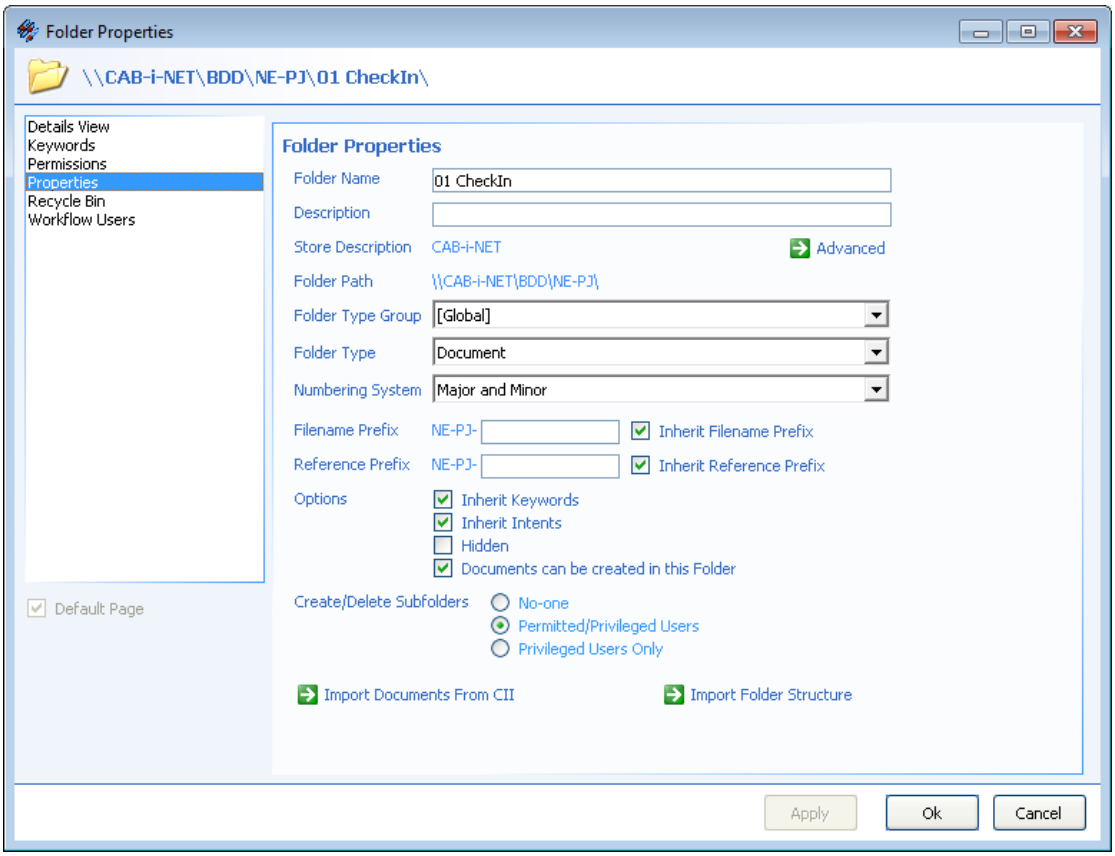


Figure 18.

Folder Name	The Folder Name can be edited in the text box if required.
Description	A description of the folder can be entered / edited in the text box if required.
Store Description	Description of the storage location.
Advanced	View properties of the folder's Documents, History and Published shares, see Figure 16.
Folder Path	The full folder path for reference.
Folder Type Group	Folder Types are assigned to Folder Type Groups. Select the appropriate Folder Type Group to select the required Folder Type (see below).
Folder Type	Select the appropriate Folder Type from the drop-down list. The Folder Type determines the type of files that can be created or imported in this folder.
Numbering System	Select from the drop-down list.
Filename Prefix	Type a File Prefix in the text box, if this prefix is to be automatically added to the file name of all files created in this folder.

Inherit Filename Prefix	Tick the checkbox if the Filename Prefix should be inherited from the parent folder.
Reference Prefix	Type a Reference Prefix in the text box, if this prefix is to be automatically added to the reference name of all files created in this folder.
Inherit Reference Prefix	Tick the checkbox if the Reference Prefix should be inherited from the parent folder.
Inherit Keywords	If the parent folder has document keywords assigned to the folder, tick the checkbox if documents in this folder should inherit the parent's document keywords. Search Criteria can include Keyword searches, allowing powerful searches to be set up.
Inherit Intents	Tick the checkbox if this folder should have the same Intents as its parent folder. Intents are selected to control the types of files that can be created or Imported in a folder.
Hidden	Tick if this folder should only be visible to privileged groups of users.
Documents can be created in this Folder	Tick this checkbox unless this folder should only hold other folders, known as 'subfolders'.
Create / Delete Subfolders	Select either No one, Permitted/Privileged Users or Privileged Users Only.
Import Folder Structure	Click this option to open the Import Folder Structure Wizard, see Figure 17.
Import Documents from CII	Click to open the Attach Document Wizard and import documents from a Cabinet Information file, see Figure 18.
Export Folder Information	Export the folder properties in a CII file.
Default Page	Tick to set the current Folder Properties page as the default page when selecting Folder Properties. The default page is displayed for other folders if the user's permissions allow it.

Advanced Folder Properties

Advanced Folder Properties - 01 CheckIn
Please be aware that requesting the following information may take several minutes, depending on the amount of data stored and the location of this folder on the network.
Note: The content of any subfolders which have been assigned their own Store in CAB-i-NET Explorer, will not be included in this folder's Windows properties.
Documents Share
Request Windows Folder Properties
Size: unknown
Contains: unknown
Date Created: unknown
Date Modified: unknown
History Share
Request Windows Folder Properties
Size: unknown
Contains: unknown
Date Created: unknown
Date Modified: unknown
Published Share
Request Windows Folder Properties
Size: unknown
Contains: unknown
Date Created: unknown
Date Modified: unknown
Request Windows Folder Properties for all Shares
Ok

Figure 19.

Click on Request Windows Folder Properties to display the required Share information.

Import Folder Structure

The form shown below is for the Import Folder Structure.

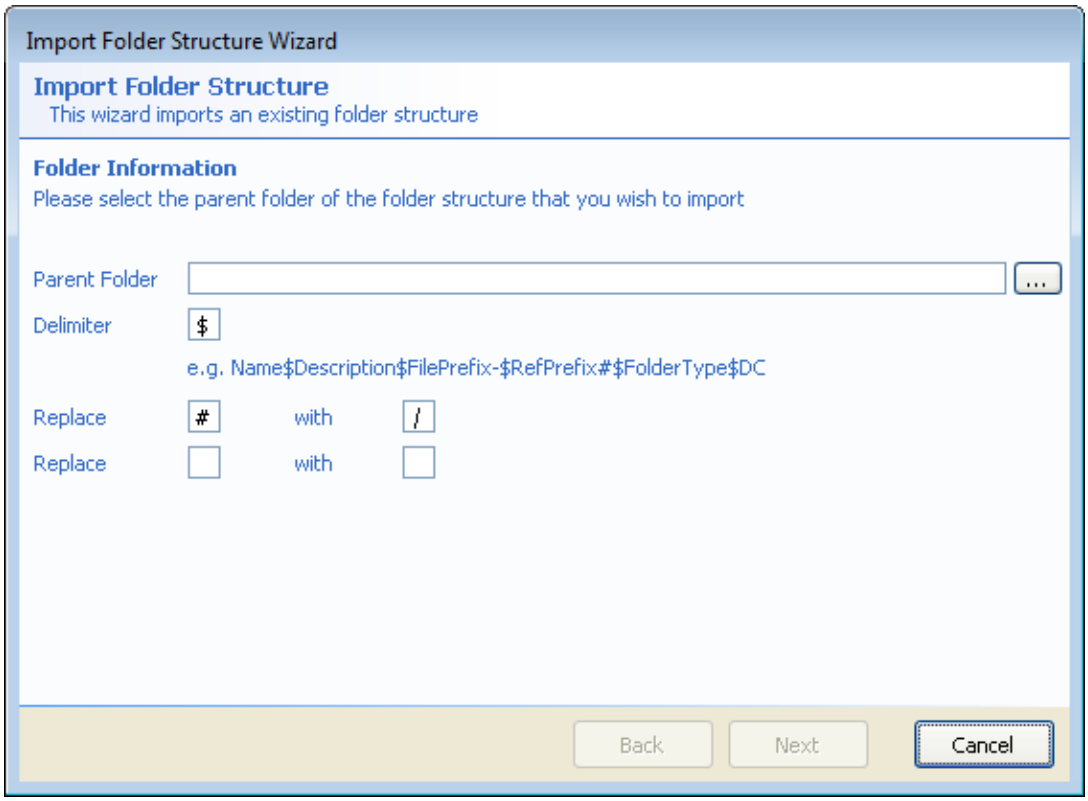


Figure 20.

Parent Folder	Enter the path to the parent folder or click the *Browse* button (see below).
Delimiter	Use the default delimiter character ($) or enter an alternative.
Replace	Use the default replacement characters (# replaced by /) or enter alternative characters.

Notes

1. Child folders for import can be selected as required on the 2nd page of the Import Folder Structure Wizard.
2. In its simplest form, only the folder structure with the corresponding folder names is imported. However, the folder properties listed below can be conveyed by adding them to the folder names, with a suitable delimiter as shown.

Name	The name of the folder.
Description	A description of the folder.
File Prefix	A prefix to be added to the folder name.
Ref Prefix	A prefix to be added to the folder reference name.
Folder Type	The name of the Folder Type.
DC	Include DC when the folder should allow documents to be created.

3. If required, a character that would be unacceptable within a folder name can be replaced by another. It would be substituted back when the import is performed. In the example above, the Reference Prefix would be followed by '/'.

Import Documents from CII

A CII file is a document information file used for document import. See *Importing Documents from CII* for further information.

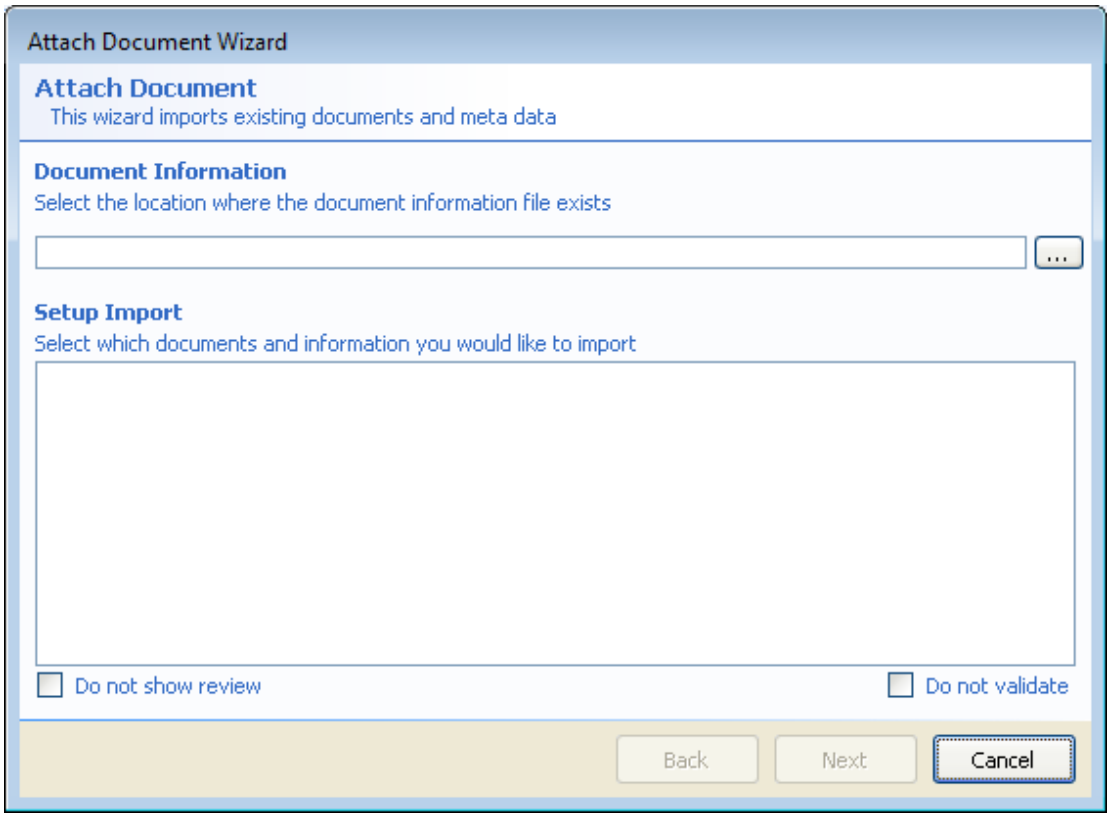


Figure 21

File Menu

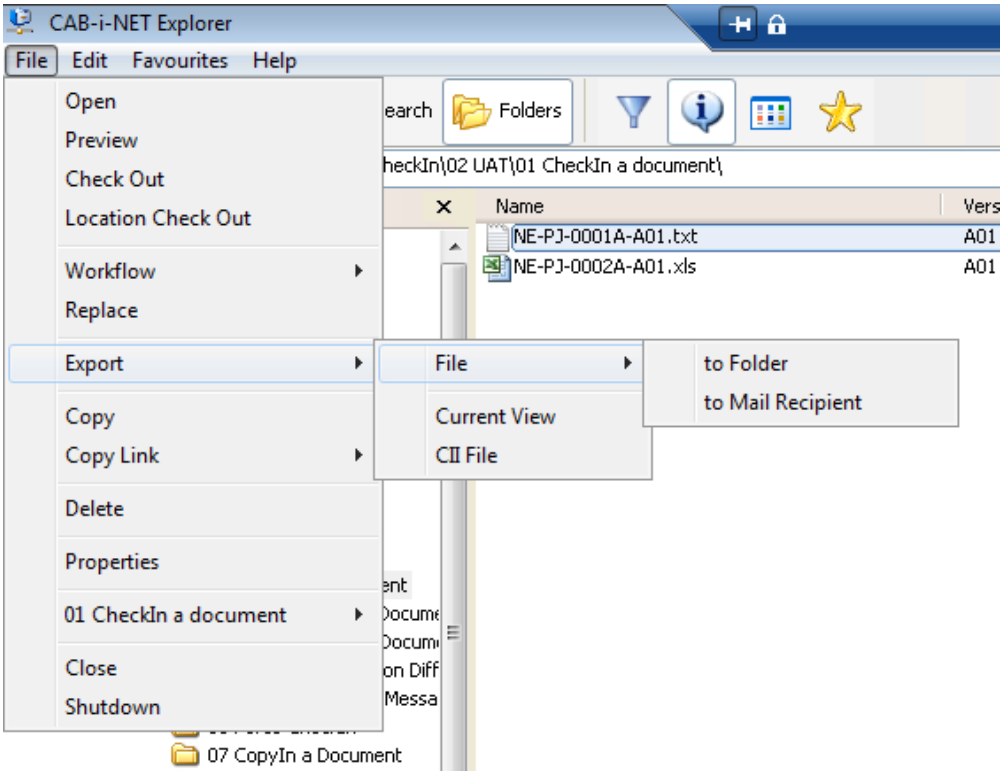


Figure 22

Open	Open the document for viewing/editing. The document is automatically checked out, so that other users cannot edit it. After editing, the document is saved, closed and checked in.
Preview	View the document (read only).
Publish	Create a published version of the document.
Check Out / Check In	A checked out document cannot be edited by other users, until it is checked in.
Location Check Out	Check Out the document to a selected location.
Workflow	Take the document to a new workflow stage, or revise it.
Replace	
Export	File Published File Previous Version Current View CII (Cabinet Information) File

Copy	Copy the selected file so that it can be pasted to a folder location.
Copy Link	Copy a link to the selected document to the clipboard, or create an email with the link included. See note below.
Delete	Delete the selected file – confirmation is required.
Properties	Display the Document Properties.
Close	
Shutdown	

Note

Links are created using the current folder path and document name. If they are changed, the link will no longer point to the required document.

Document Properties

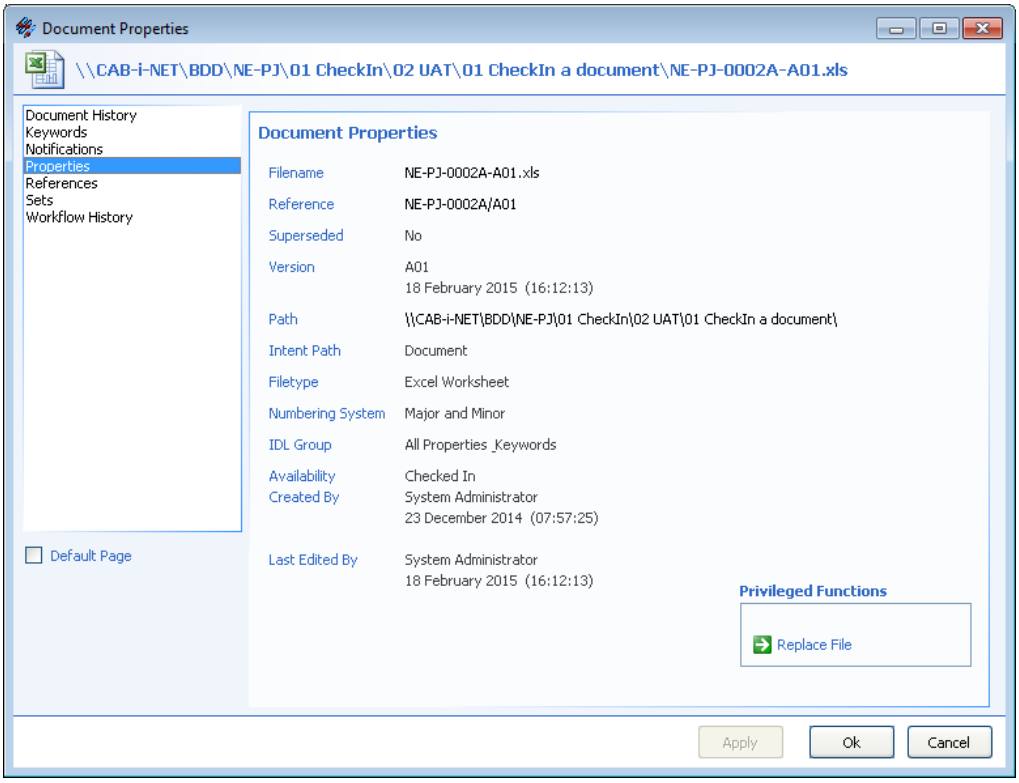


Figure 23

Filename	The filename of the selected file.
Reference	The reference name of the selected file.
Superseded	States whether the document is outdated by another version.
Version	Characters that identify the version of the document.
Path	The full path of the folder that holds this document.
Intent Path	The intent used to create the document.
Filetype	The name of the application to be used for this document.
Numbering System	The name of the document's numbering system.
IDL Group	Intelligent Data Link Group. IDL is user to update information automatically, from a document to the Cabinet Explorer database or vice versa. Configuration of IDL is described in the Cabinet Administrator User Guide.
Availability	The checked in /out status of the document.
Created By	The name of the user who created the document, creation date and time.
Last Edited By	The name of the user who last edited the document, editing date and time.
Default Page	Tick the required page to select it by default when the *Document Properties* menu item is selected. The default page applies in other folders if the user's permissions allow it.

Copy / paste special

When copying multiple files and *Paste Special* is selected in the destination folder, the following form is displayed.

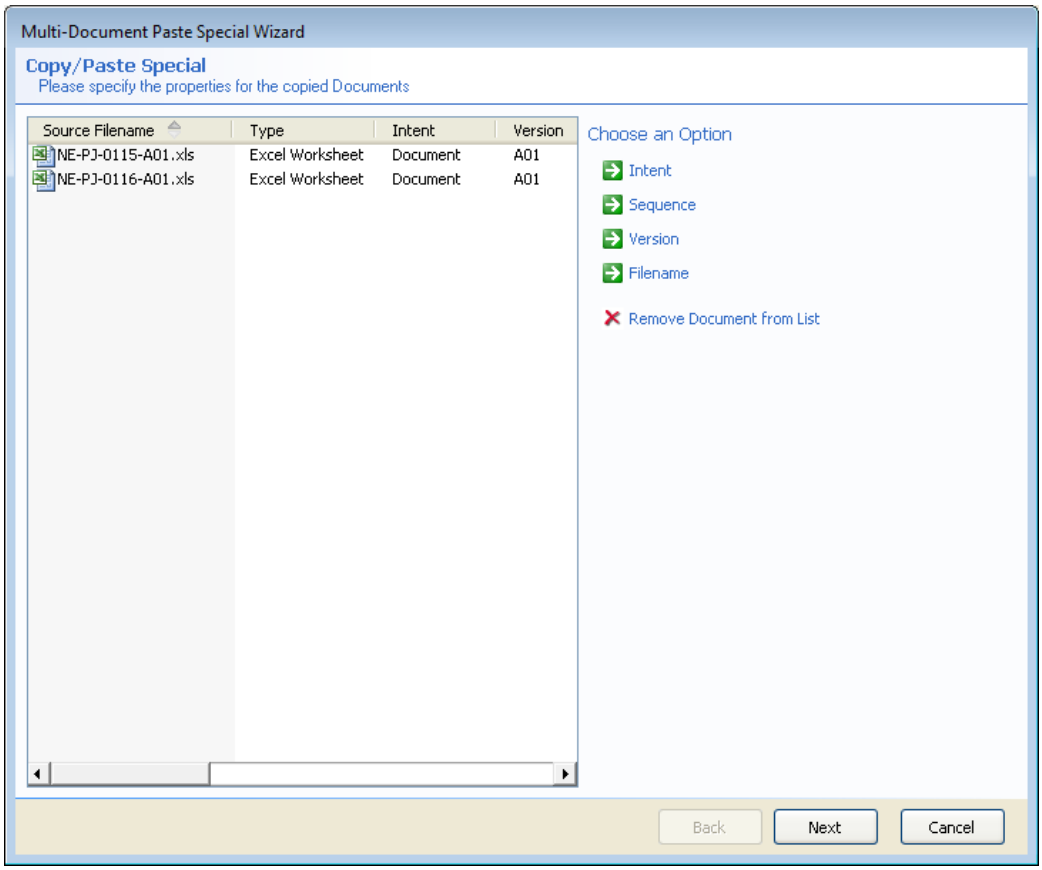


Figure 24

If *Next* is clicked, files which require options to be selected to allow the paste to succeed are shown with yellow exclamation triangles. The status column indicates the type of option to select, as shown in the following table.

Option	Description	Action
Intent	The Intent of the document does not exist in the destination folder.	Select Intent from the alternatives shown.
Sequence	The document number already exists.	Select the next available number.
Version	The version number already exists.	Select an alternative version number.
Filename	A new filename is required.	Enter a new filename.
Remove Document from List	Remove the selected document(s) from the paste operation. (The selected documents are not deleted).	Select the documents which should not be pasted and click *Remove Document from List.*

Setting User Preferences

Default actions can be set for certain operations, instead of routinely clicking buttons in dialog boxes. This saves time if the same option is preferred in all cases. User Preferences can be edited at any time, as appropriate.

Select Edit > User Preferences.

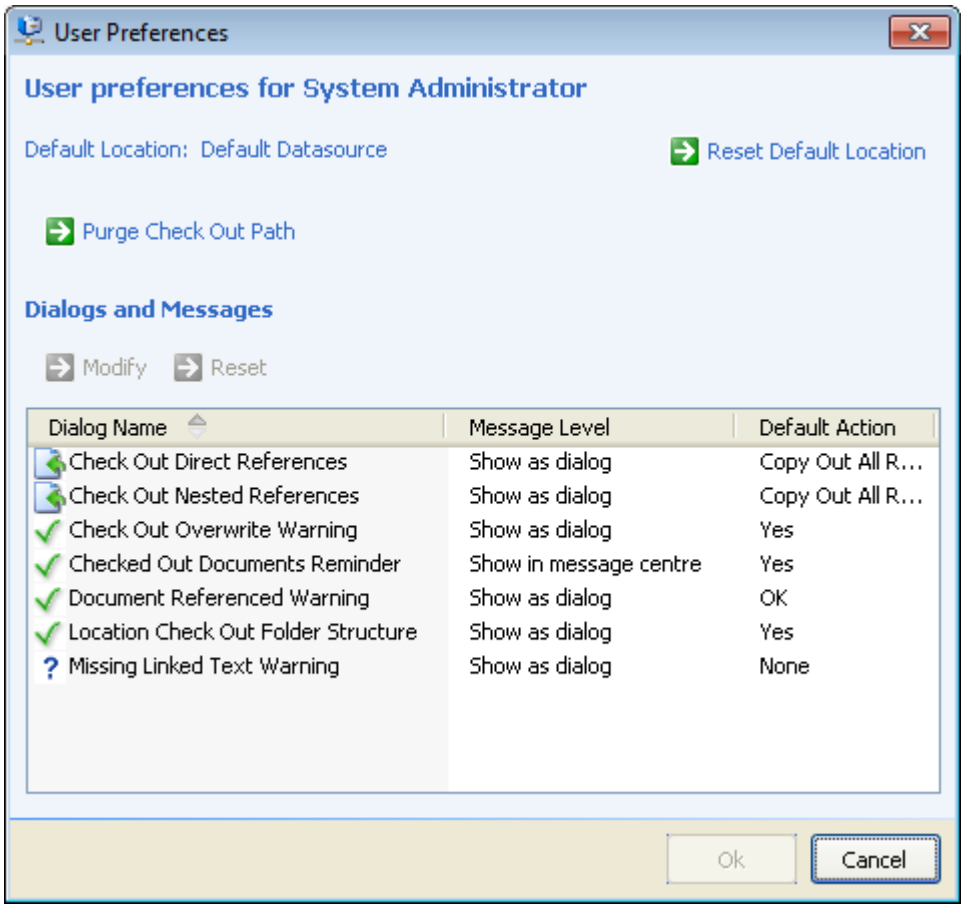


Figure 25

Question marks indicate that prompts are displayed as dialog boxes; in this case there is no default action. Ticks and crosses indicate Yes / No default actions.

Check Out References	Prompt to Check Out document references in addition to the selected document.
Checked Out Documents Reminder	Prompt if Cabinet Explorer is shut down while the user's documents are checked out.
Checkout Nested References	Prompt to copy out all references, checkout direct references or checkout all references.
Document Referenced Warning	Prompt when a checked out document is referenced by another document.
Location Folder Structure	Prompt to include the folder structure in Location Check-out.
Warn of Missing Linked Text on Multiple Import	Prompt when importing multiple file types with no Linked Text (IDL Group) selected.

Two message level options are available for each item listed:

Show as dialog	Display a form which allows options to be selected.
Show in message centre	Display a message in the message pane and perform the selected default action.

To edit an item, select it and click *Modify*.

If *Show in message centre* is selected, also select the required default action.

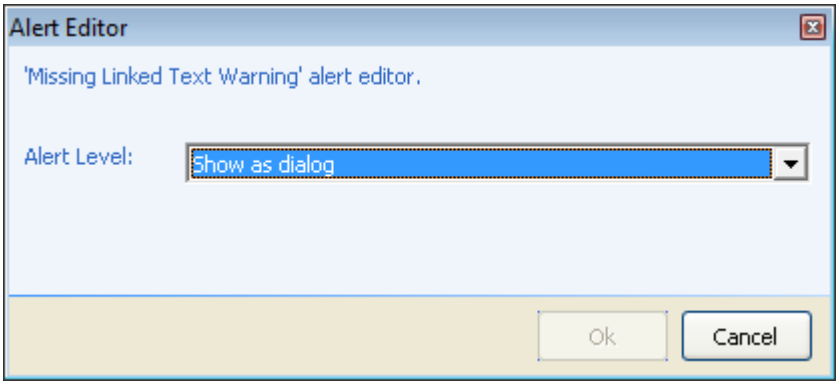


Figure 26

Note that for prompts displayed in a dialog box, if they *Do not show this message again* checkbox is ticked, the user preference is automatically updated to *Show in message centre*.

Reset Default Location

Click to cancel a default location, if applicable, as shown on this form. Refer to Default Location on page 10 if a new default location is required.

Purge Check Out Path

Click to purge folders and files in the user's Check Out path. Checked Out documents and their folders remain, but other folders and files will be deleted, including document references that have been copied out. The user's Check Out path is shown in the confirmation message.

Accomplishing Tasks in Cabinet Explorer

Editing the Cabinet Configuration

Right-click on the Cabinet root folder and select *Properties*.

Select *Configuration* at the left of the form.

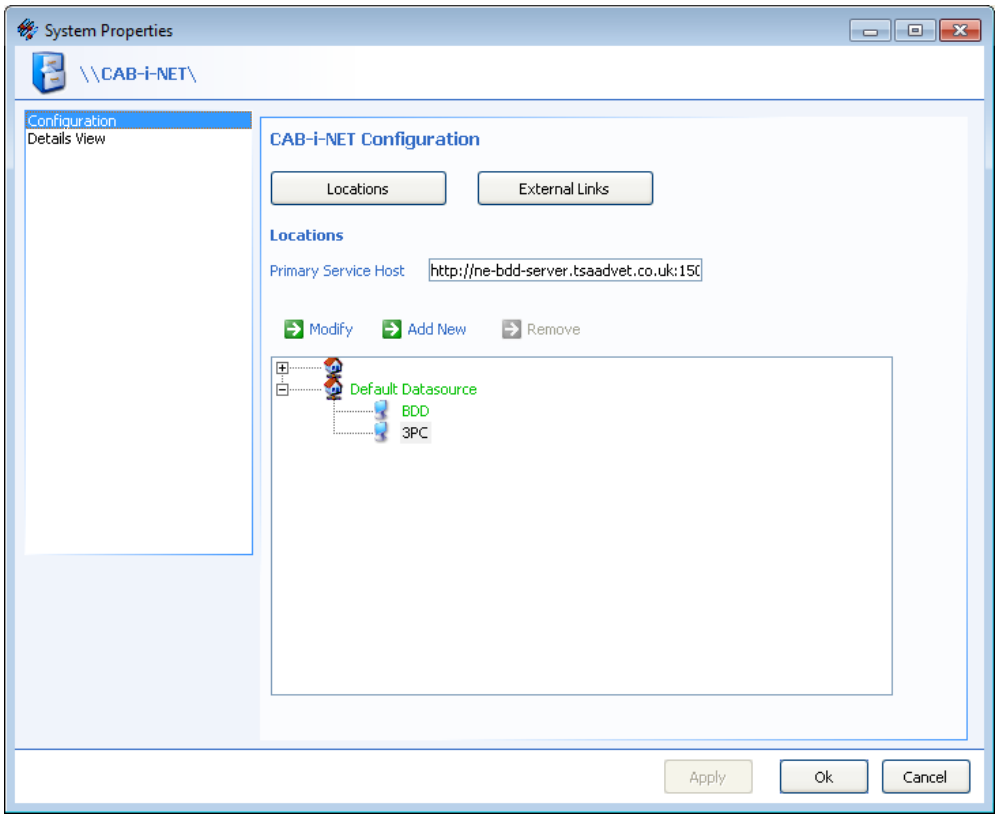


Figure 27

Primary Service Host

Service host details must be entered when using Cabinet notifications. They are in the form http://<server name>/<path>. If further assistance is required, please contact Cabinet Support.

Adding a New Location

Click on *Add New*.

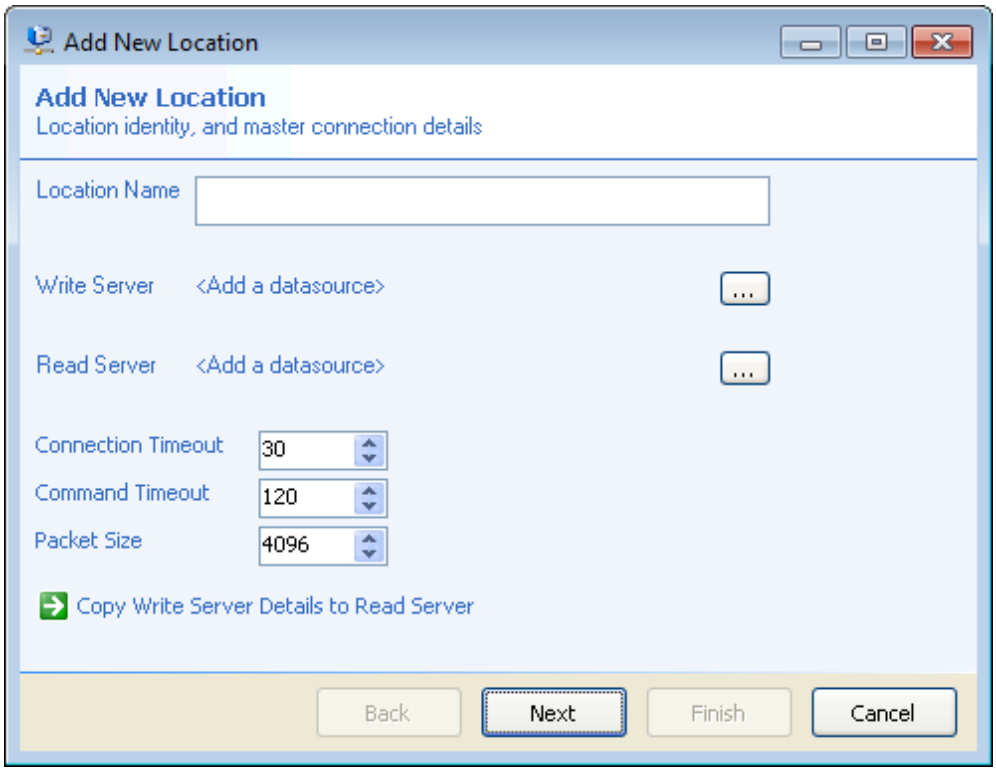


Figure 28

Add a name for the location.

Click the *Write Server* '…' button and enter the write server Master connection details.

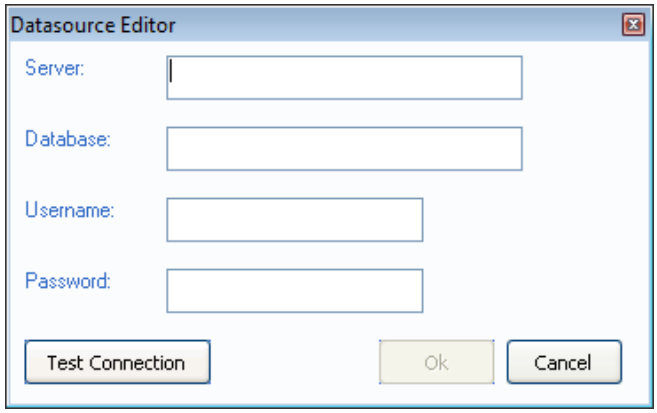


Figure 29

- Click *Test Connection*, confirm successful connection and click *OK*.
- Click *Copy Write Server Details to Read Server* if appropriate, or click the Read Server '…' button and enter the read server Master connection details.
- The Connection Timeout, Command Timeout and Packet Size values should remain set to the default values unless there is a need to change them.
- Click *Next*.
- Similarly, enter details for the write and read Instance servers.
- Click *Next* and *Finish*.

Modifying a Location

Select a Master location or an Instance from the list and click *Modify* to edit the details.

Removing a Location

Select a Master location from the list, click *Remove* and confirm deletion.

Database Synchronisation

If the selected location has different read and write servers, i.e. replication is being used, a synchronisation message will be displayed after performing various operations.

If a synchronisation timeout occurs, a form is displayed which offers the option of using the 'master' connection. In this case the replicated database is no longer used. If the 'master' connection is selected, it applies until Cabinet Explorer is shut down, restarted and an appropriate location is selected.

If the 'master' connection is not selected, it may prove to be possible to continue using Cabinet Explorer replication, if Synchronisation is satisfactory.

Editing External Links

External links are displayed when neither the *Folders* nor the *Search* button is selected.

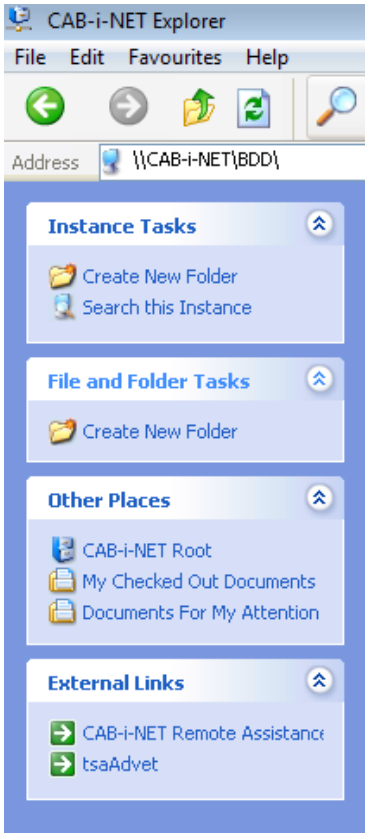


Figure 30

To edit external links, right-click on the Cabinet root folder, select *Properties* and select *Configuration*.

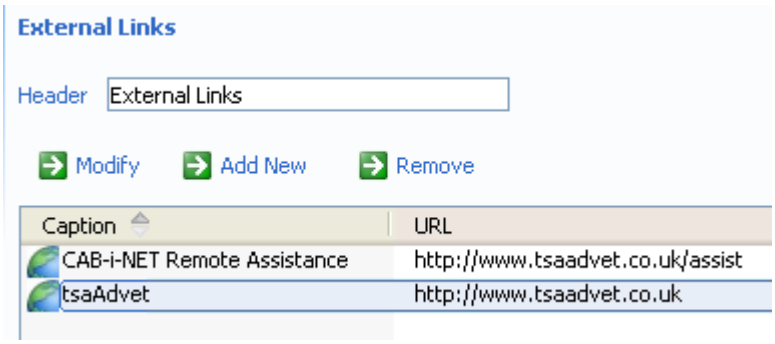


Figure 31

Alternatively, click *Add New* or *Remove* as required.

Adding a New User

Note that Cabinet Explorer can be configured to have more than one Context, and that Users are created in a specific Context.

In the folders / files pane, right-click and select *Configure* > *[context name]*.

Select one of the following:

- Select *Users* at the left of the form. Above the *Users* list, select *Create New User.*
- Select *Users* at the left of the form, right-click in the users list and select *Create New User* from the menu.
- If the new user is to be a member of an existing group, select *Groups*, click on the group name in the groups list, double-click on *Add New User*… in the members list and enter the user's details. Alternatively, the user can be added to a group or groups later.

Enter all of the information in the first page of the Create User Wizard.

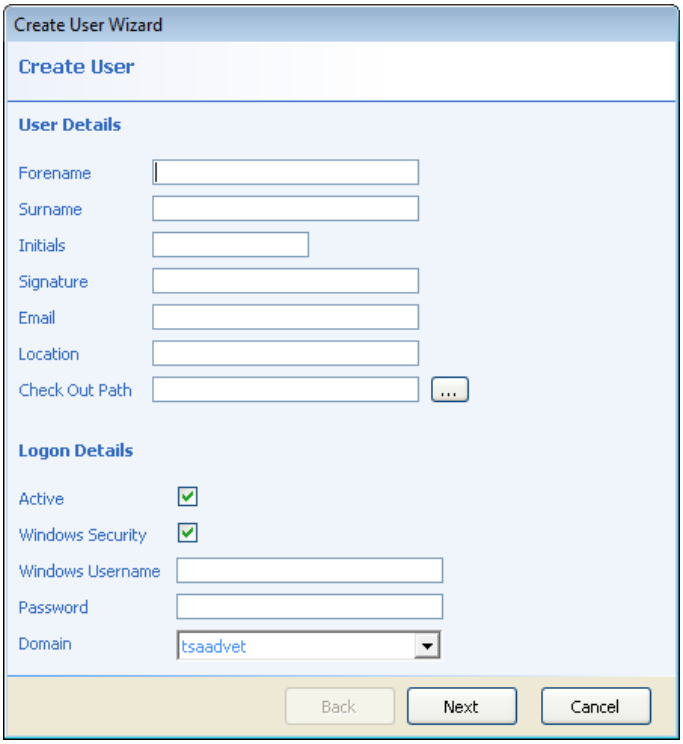


Figure 32

Enter the user's forename, surname, (initials and signature field are automatically updated); Email address and location are optional. The remaining fields are detailed below:

Check Out Path	Browse to the location to be used for checked-out documents.
Active	Tick if the user's account is active.
Windows Security	Tick the checkbox if Windows security is required; clear it if Cabinet security is required.
Windows Username / Cabinet Username	Enter the Windows or Cabinet username for this account.
Password	Enter the password for this account.
Domain	Select the Domain from the drop-down list, if Windows security is selected.

Click Next to continue to the second page.

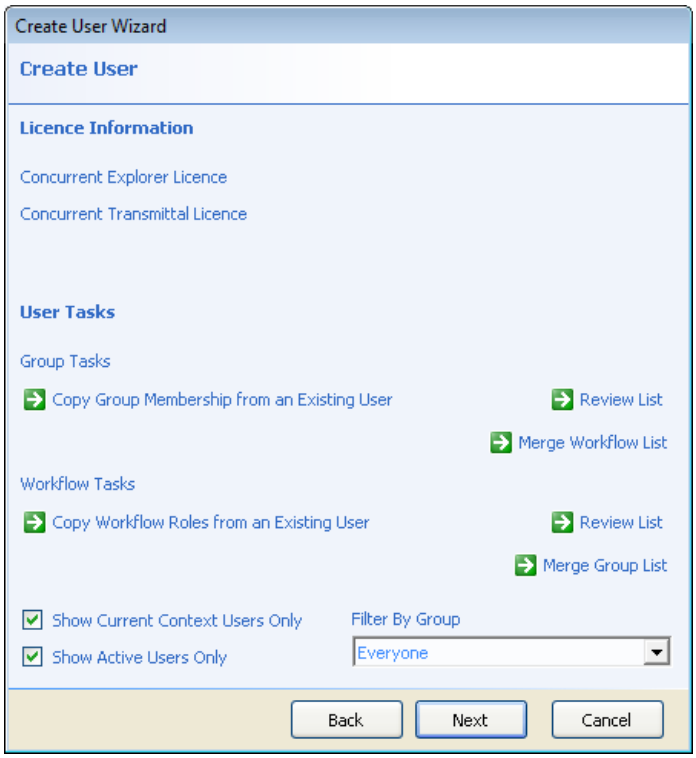


Figure 33

If it is preferred to display lists of users filtered by Group, select the group in the drop-down list.

Enter the following details:

Fixed Explorer Licence	Tick if the user is to be licensed to use Cabinet Explorer.
Fixed Browser Licence	Tick if the user is to be to use Cabinet Browser.
Fixed Transmittal Licence	Tick if the user is to be licensed to use Cabinet Transmittal.
Copy Group Membership From an Existing User	Click to select a user and copy their group membership to this user. Repeat to select additional user's groups.
Review List	Review the user or users whose groups or workflow roles will be copied. To delete a user from the *Review* list, right-click and select *Do Not Copy From This User.*
Merge Workflow List	Merge the workflow list of users (see below) into the Group list.
Copy Workflow Roles from an Existing User	Click to select a user and copy their workflow roles to this user. Repeat to select additional user's workflow roles.
Merge Group List	Merge the Group list of users (see above) into the Workflow list.
Show current Context Users Only	Tick the checkbox to only show users in the current Context in the *Copy Group Membership* and *Copy Workflow Roles* lists. Clear the checkbox to include users in other Contexts.
Show Active Users Only	Tick the checkbox to only show active accounts in the *Copy Group Membership* and *Copy Workflow Roles* lists. Clear the checkbox to include disabled or deleted accounts.

Notes

1. If no Check Out Path is entered, the system default path is used (C:\Cabinet\).
2. An account can be made active / inactive later. Select Users, click on the user name, right-click and either :
   a. select *Enable Account* from the menu.
   or
   b. select *Properties* from the menu and tick the *Active* checkbox.
3. If Windows security is not selected, the user will be required to login using a Cabinet username and password.
4. Applies to the *Fixed* licence scheme only.
5. If the checkbox is cleared, users in other Contexts are shown in dark blue for active accounts and light blue for disabled or deleted accounts.
6. If the checkbox is cleared, users with disabled or deleted accounts are shown in grey in the current Context and light blue in other Contexts.

Click *Next* and review the summary information.

If any details are incorrect, click *Back* and edit them.

Click *Finish* to add the new user. Their name appears highlighted in the users list.

Editing User Properties

Note that Cabinet Explorer can be configured to have more than one Context. Users are created and edited in a specific Context.

To edit user properties, right-click in the folders / files list and select Configure > [context name].
Select *Users* at the left of the form to display the *Users* list for the selected Context.

Clear the *Show Active Users Only* checkbox to include users with disabled accounts, shown in grey text.

Clear the *Show Current Context Users Only* checkbox to include users in other Contexts, shown in dark blue for active accounts and light blue for disabled or deleted accounts.

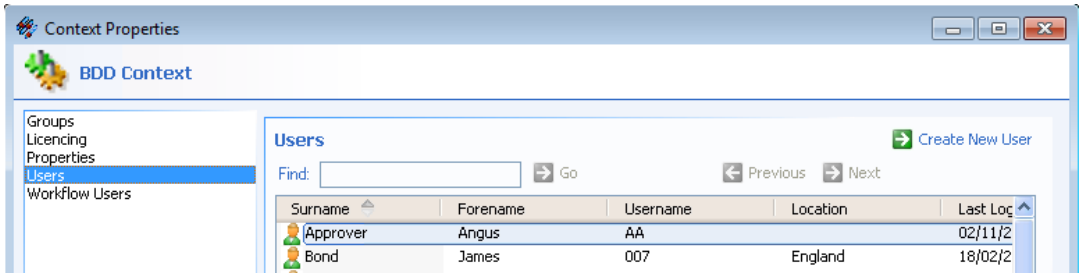


Figure 34

To assist navigation through a long list of users:

- Select the column to be searched, for example *Surname*.
- In the *Find* text box, type the name to be found and click *Go*.
- Click *Next* or *Previous* to select other matching names

Click on the user's surname, right-click and select *Properties* from the menu. User Properties are displayed on four pages as shown. Refer to Adding a New User on page 33 for descriptions of the properties.

Edit the properties as required and click *OK* to save them.

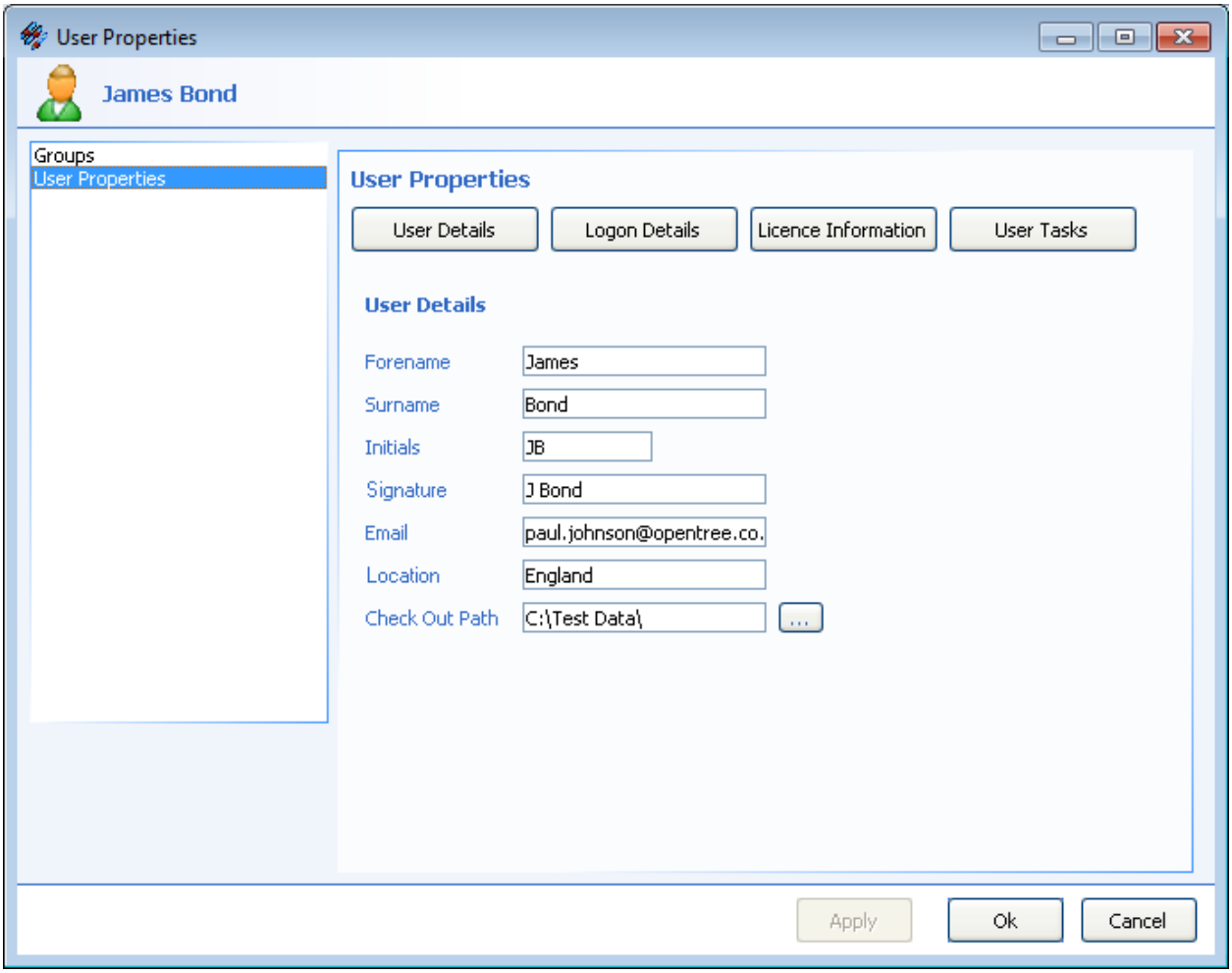


Figure 35 – User Details screen

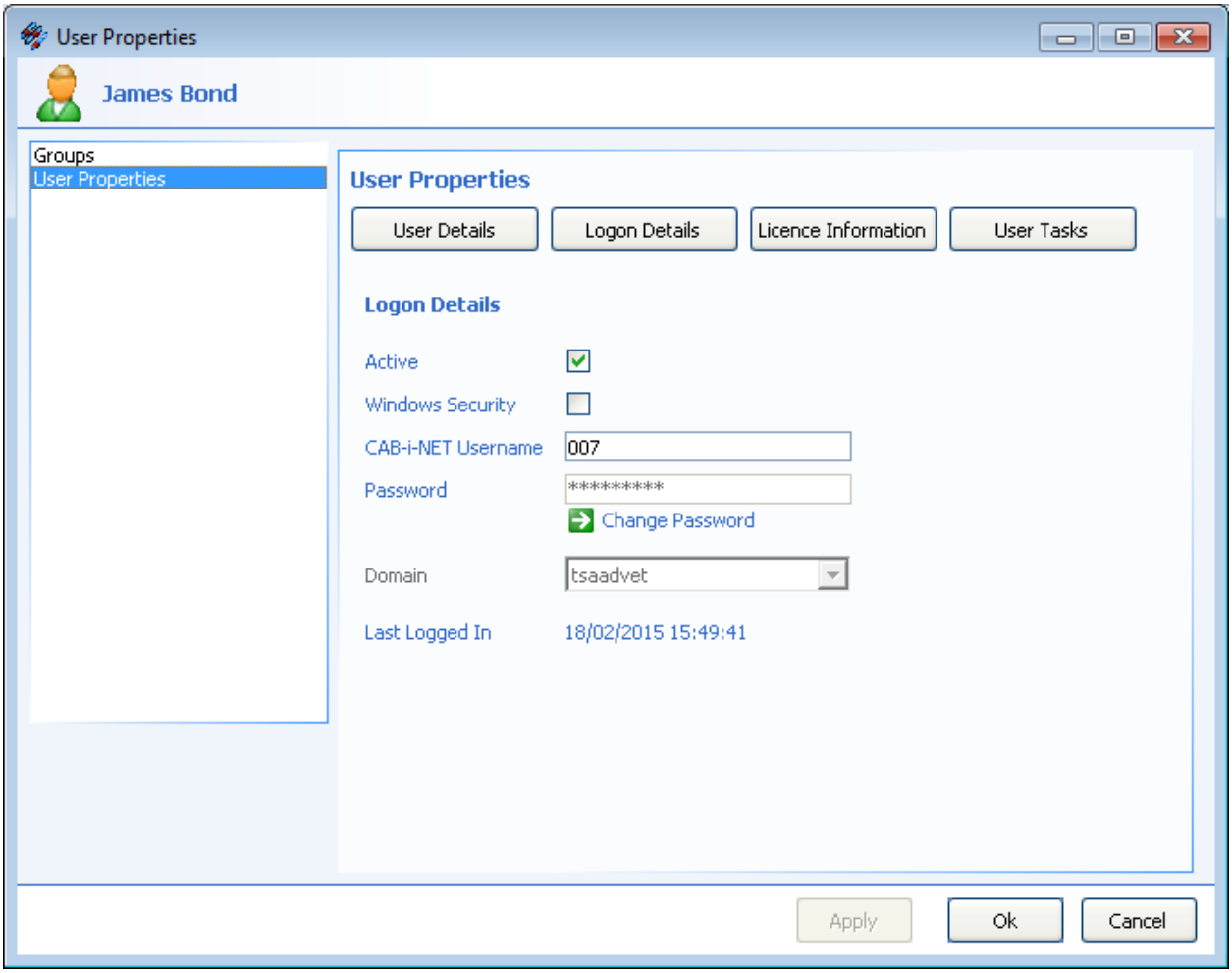


Figure 36 – Logon Details screen

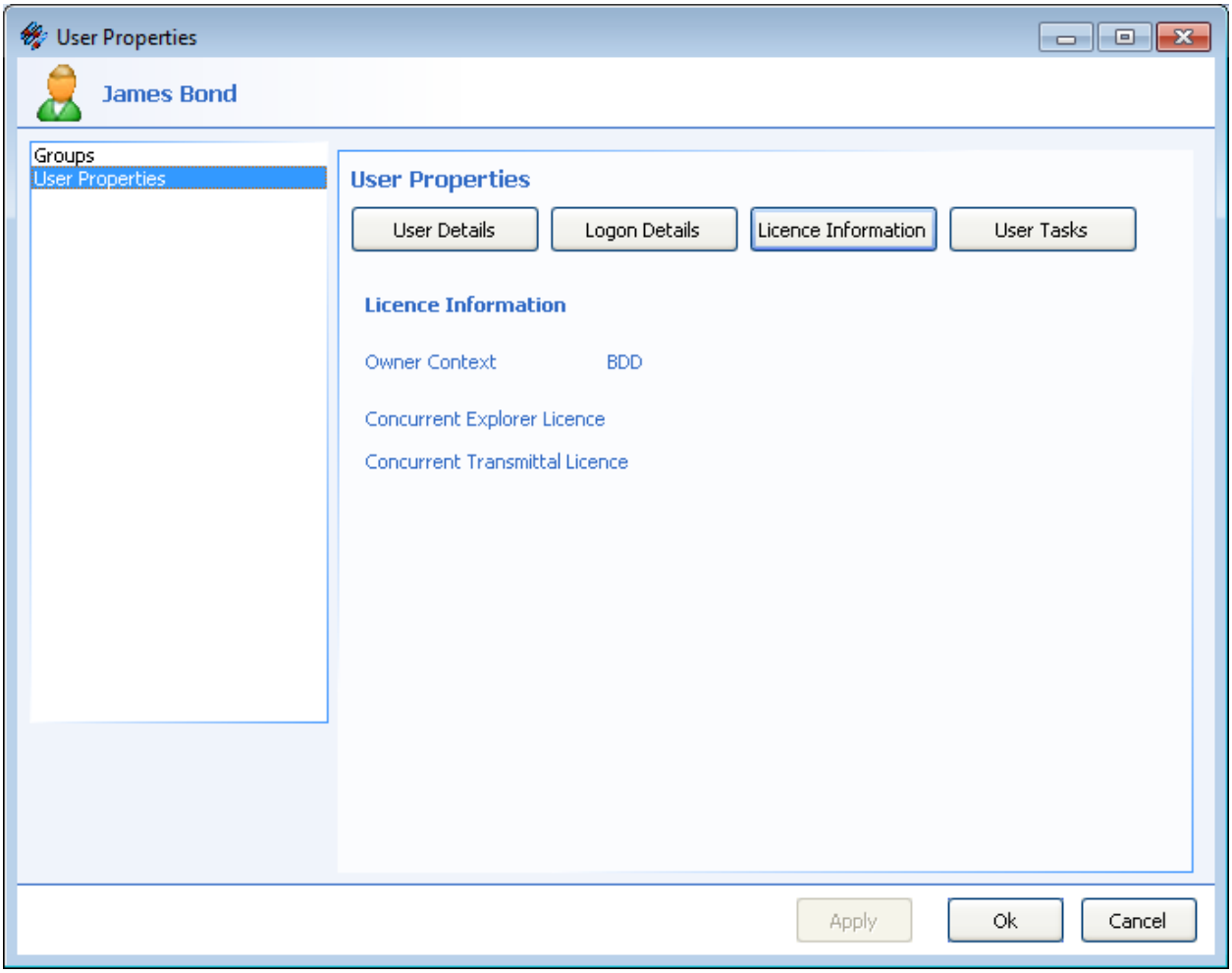


Figure 37 – Licence Information screen

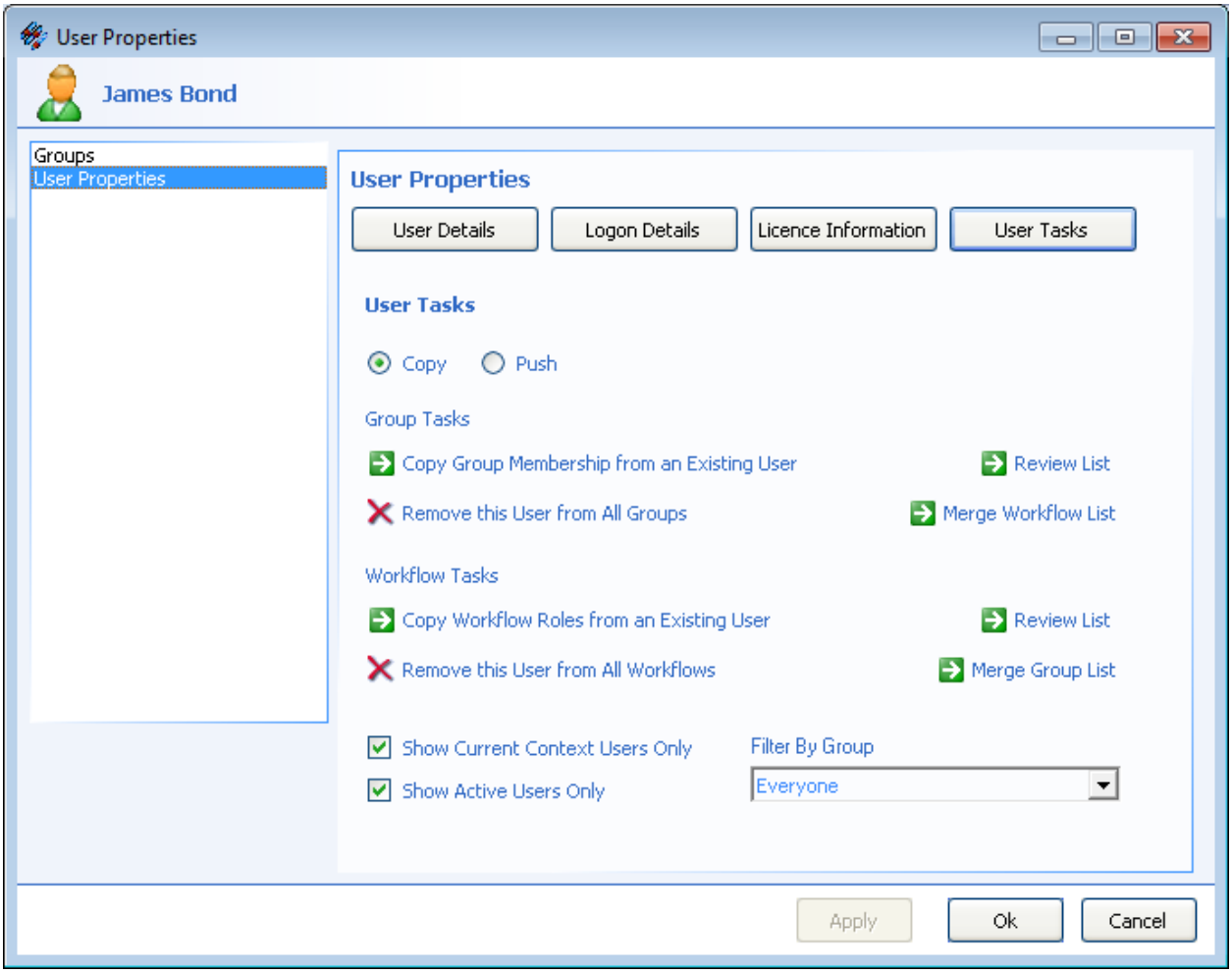


Figure 38 – User Tasks

To Filter by Group, select the group from the drop-down list.

Copy	Copy group membership and / or workflow roles **from** other users **to** this user.
Push	'Push' group membership and / or workflow roles **to** other users **from** this user.
Remove this User from All Groups	Typically, this operation may be performed before copying group membership from an existing user or users. However, if this option is selected after starting to copy group membership (a name or names are shown in the *Review List*), those names will remain after *Remove this User from All Groups* is clicked. The copying process can be completed when *OK* is clicked.
Remove the User from All Workflows	Typically, this operation may be performed before copying workflow roles from an existing user or users. However, if this option is selected after starting to copy workflow roles (a name or names are shown in the *Review List*), those names will remain after *Remove this User from All Workflows* is clicked. The copying process can be completed when *OK* is clicked.
Show Current Context Users Only	To view users in other Contexts when copying Group membership or Workflow roles, clear the *Show Current Context Users Only* checkbox first. Users in a different Context are listed in blue text, or light blue if their account is disabled / deleted.
Show Active Users Only	To view users with disabled or deleted accounts when copying Group membership or Workflow roles, clear the *Show Active Users Only* checkbox first. Users in the current Context with disabled or deleted accounts are listed in grey text.

Enabling / disabling / deleting / restoring Users

In the folders / files pane, right-click and select Configure > [context name]. Select Users at the left of the form to display the Users list for the selected Context.

Enabling Users

To include users in the list whose account has been disabled, clear the *Show Active Users Only* checkbox. Disabled accounts in the current Context are listed in grey text (or light blue for other Contexts).

Right-click on the user's surname and select *Enable Account* from the menu.

The user becomes listed in black text, indicating that their account is enabled.

Disabling Users

If a user's account is disabled, the user is no longer able to log in to Cabinet Explorer, but their properties can be viewed.

Right-click on the user's surname and select *Disable Account.*

Note that if the *Show Active Users Only* checkbox is ticked, the user is no longer listed. Clear the checkbox to include disabled accounts, listed in grey text for users in the current Context or light blue for users in other Contexts.

Deleting Users

If a user's account is deleted, the user can no longer log in to Cabinet Explorer and their properties cannot be viewed.

Group membership and workflow roles of users whose account is deleted are maintained, so that if they have been actively involved in Cabinet Explorer processes, their account can be restored conveniently if required.

Right-click on the user's surname, select *Delete User* and confirm that the user's account should be deleted.

Note that if the *Show Active Users Only* checkbox is ticked, the deleted account is no longer listed. To include deleted accounts, clear the checkbox. Deleted accounts are listed in grey for users in the current Context, or light blue for users in other Contexts, with the following icon:

Restoring Users

To restore deleted accounts, clear the *Show Active Users Only* checkbox in the Users page. Deleted accounts are listed with the icon shown above.

Right-click on the user's surname and select *Restore User* from the menu. The user's account is then listed with the following icon:

Viewing Licence information

Licencing is organised by *Context*. Right-click in the folders/files list and select *Configure > [context name]*.

To view the *licencing* page, select *Licencing* at the left side of the *Context Properties* form.

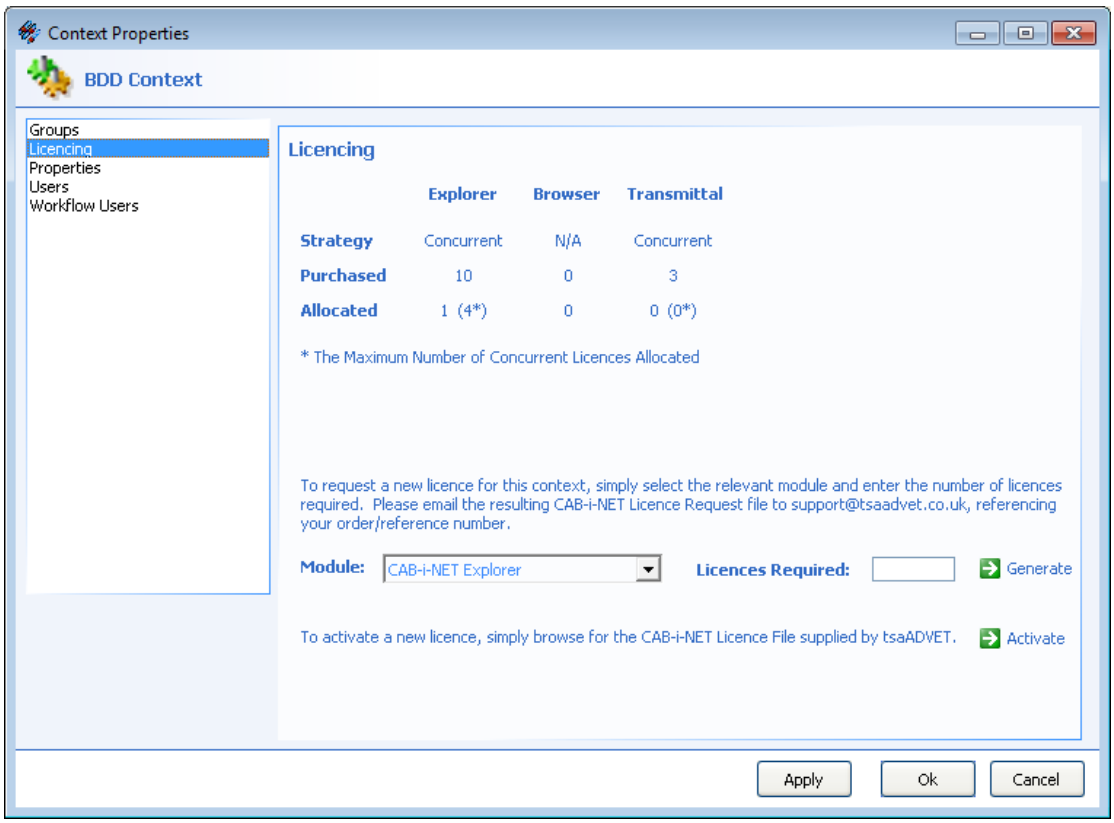


Figure 39

Cabinet Explorer supports two licencing strategies:

Licensing strategy	Description
Concurrent	Concurrent Licensing is based on the maximum number of users who can be simultaneously logged into Cabinet Explorer. The licensing page shows the number of concurrent licences purchased and allocated. Two *allocated* figures are displayed. These are the current number of simultaneous users and in bracket the maximum number of simultaneous users that have been logged into Cabinet Explorer at any one time.
Fixed	*Fixed* licensing is based on the number of users who are defined as Cabinet Explorer, Cabinet Browser or Cabinet Transmittal users in their *User Properties*. The Licencing page displays the number of Cabinet Explorer, Cabinet Browser and Transmittal licences that have been purchased and allocated to users in their *User Properties* page.

To view a list of each user's individual Cabinet Explorer , Browser or Transmittal fixed license settings, select *Configure > [context name]*, select *Users* and view the *Explorer User, Browser User* and *Transmittal User* columns in the *Users* list. Each column is only visible if *Fixed* licencing applies.

Editing a user's Licence settings

If *Fixed* licencing applies, each user's licence settings can be viewed and edited. Select *Configure > [context name]* and select the *Users* page in *Context Properties*.

Right-click on the user's name, select *Properties* and the *Licence Information* page. Edit the *Explorer User, Browser User* and *Transmittal User* checkboxes as required. The checkboxes are only visible if *Fixed* licencing applies.

Note that users with disabled or deleted accounts, who are defined as Explorer, Browser or Transmittal Users, contribute to the respective Allocated figure. Edit their license settings if required.

Requesting additional licenses

In the Context's *Licencing* page (see Figure 32), click on the *Module* drop-down list, select the module (Cabinet Explorer, Browser or Transmittal) and enter the number of additional licences required.

Click *Generate* to create a licence request file and select a convenient location to save the file.
Email the file to support@Opentree.co.uk, referencing your order / reference number.
When a licence file is returned by Opentree, save it to a convenient location.

In the licence page, click the *Activate* button.
Select the licence file from the location used to save it.

When the license is successfully updated, a confirmation message is displayed and the values in the license page are updated.

Adding a New Group

Content goes here…

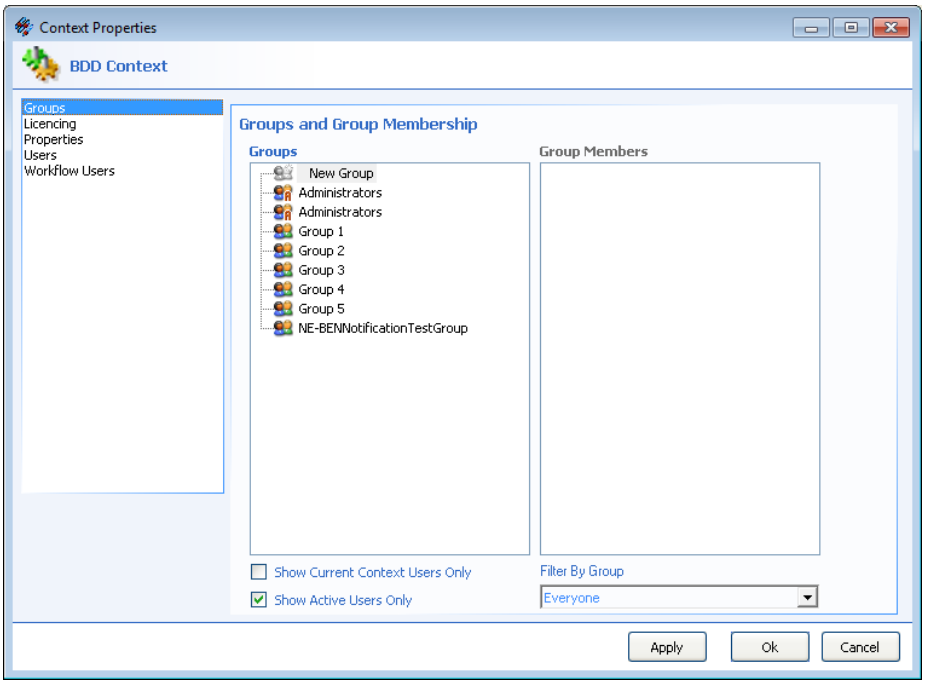


Figure 40

Right-click in the folders / files list and select Configure > [context name].Select *Groups* at the left side of the Context Properties form.

Click on *New Group* and its name, and then press Enter. The new group will be added to the Groups list, in alphabetical order.

Setting Group Privileges

Click on the group name (see above), right-click and select *Privileges.*

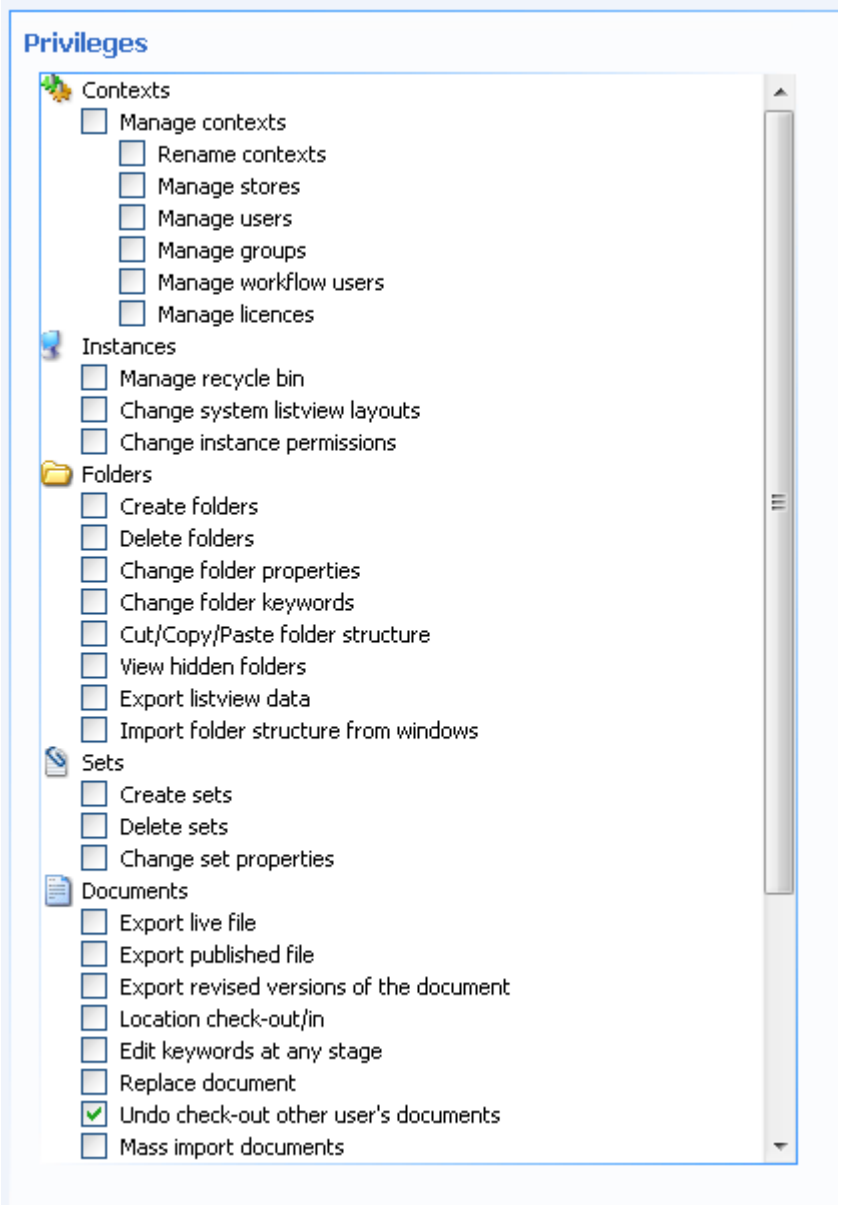


Figure 41

Rename Contexts	
Manage Stores	
Manage Users	
Manage Groups	
Manage Workflow Users	
Manage Licences	
Manage Recycle Bin	
Change System Listview Layouts	
Change Instance Permissions	
Create Folders	
Delete Folders	
Change Folder Properties	
Change Folder Keywords	
Cut / Copy / Paste folder structure	
View Hidden Folders	
Export Listview Data	
Import Folder Structure from Windows	
Export Live File	
Export Published File	
Export Revised Versions of the Document	
Location Check-Out/In	
Edit keywords at any stage	
Replace document	
Undo check-out other user's documents	
Mass import documents	
Edit the keywords/IDL Group of multiple documents.	
Override transition co-ordinator	
Reverse workflow	
Change workflow	
Rollback to a previous version	

Modify system searches	
Manage global address book	
Create transmittal templates	

Tick or clear the checkboxes as required and click OK to save the changes.

Groups configured as *Administrators* do not have privilege settings; they can perform all actions by default. Administrator groups are indicated by the following icon:

Note that Cabinet Explorer behaviour may also be determined by Permission settings.

For example, the ability to create folders is determined by:

- The *Create Folders* Privilege of the user's group.
- The parent folder's *Folder Properties* > *Add/Delete Subfolders* setting.
- The parent folder's *Folder Properties* > *Permissions* > *Create Subfolder* setting for the user's group

Adding / deleting group members

Content goes here…

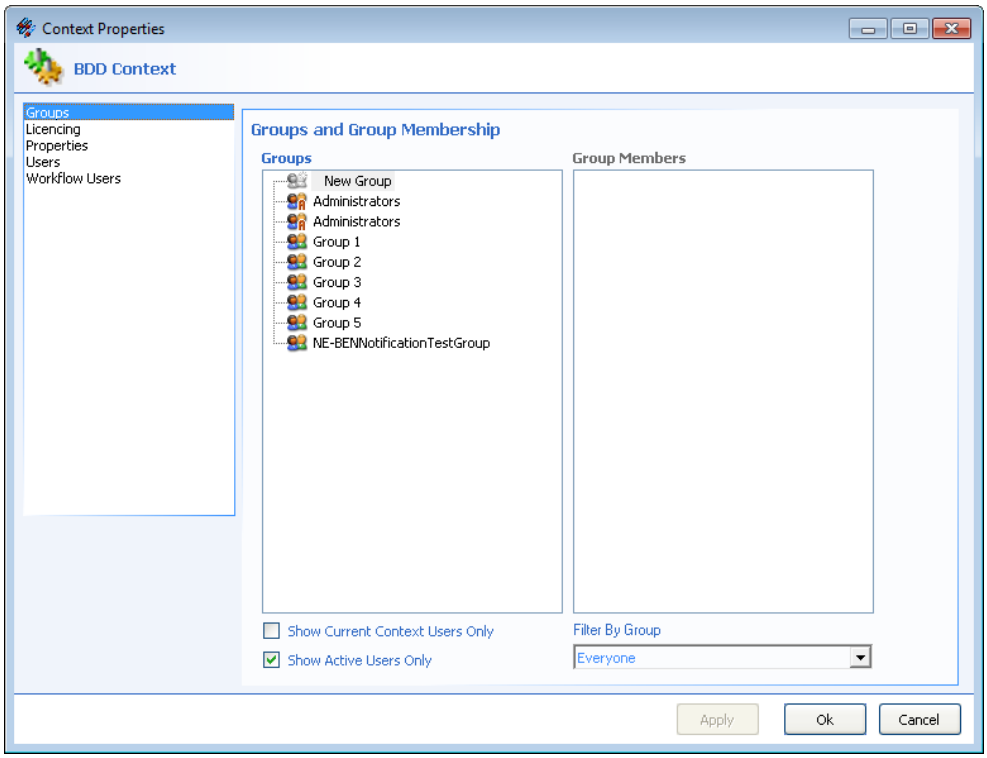


Figure 42

Select *Groups* at the left side of the Context Properties form (see above).

Click on the group name in the groups list so that it is highlighted.

The members list shows users who are members of the group.

Select a group from the *Filter By Group* drop-down list to show users that are members of that group only.

Viewing Users in Other Contexts

Clear the *Show Current Context Users Only* checkbox. Users in other Contexts are shown in blue text, or light blue if their account is disabled.

Viewing Users with Disabled Accounts

Clear the *Show Active Users Only* checkbox. Users in the current context with disabled accounts are shown in grey text.

Adding group members

Click on *Add Existing Users.*

To search for a user, enter the name or part of the name in the *Find* textbox and use the *Go / Next / Previous* buttons as required.

Click on column headers to search in that column.

Select the user(s) and click *OK*.

Deleting group members

Right-click on the user's name and select either:

Remove <user name> From Group.

Or

Remove Multiple Users from Group

Viewing and editing a user's groups

In the folders / files pane, right-click and select Configure > [context name].
Select *Users* at the left of the form to display the *Users* list for the selected Context.

Right-click on the user's name, select *Properties* and select *Groups* at the top left of the form.

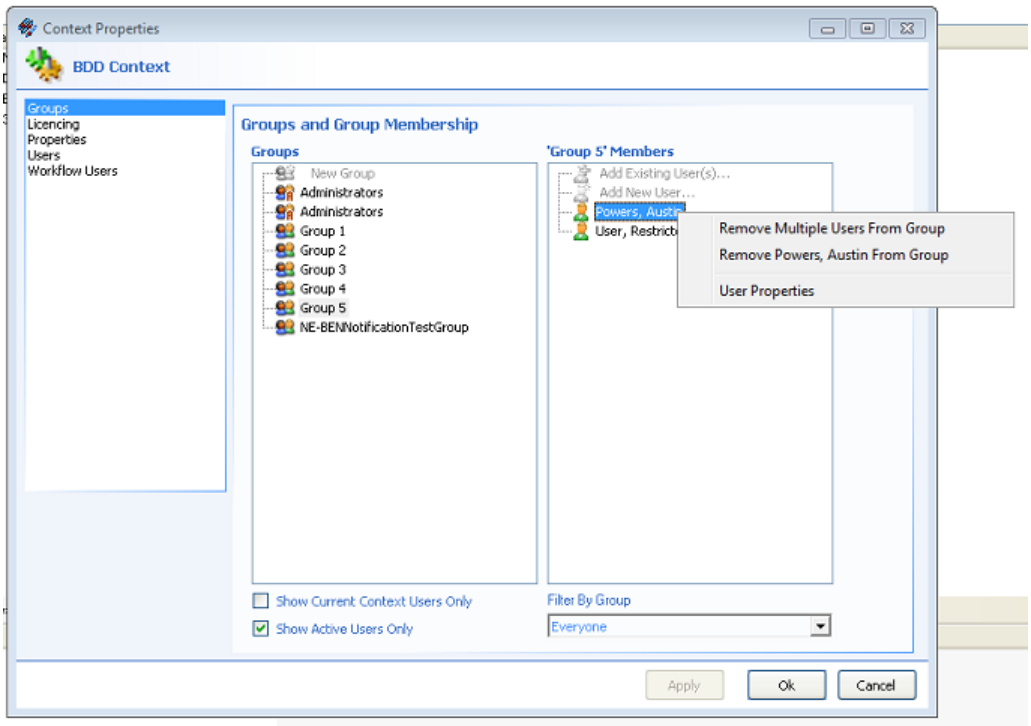


Figure 43

Select Filter By Group, Show Current Context Users Only, Show Current Context Users Only and/or Show Active Users Only as required.

If the user is a member of a group in a different context, the context and group names are shown in red. Members of these groups are not displayed.

Click on a group name to list its members. The selected user's name is highlighted.

To add the user to a different group, double-click on Existing Group and select the group from the list.

Adding a user to a workflow

The user must be assigned to a workflow stage (or stages) in the Context Properties *Workflow Users* page, before they can be added to the workflow stage for a specific folder.

Context Properties

Right-click and select *Configure > [context name].*Select *Workflow Users* at the left side of the *Context Properties* form.

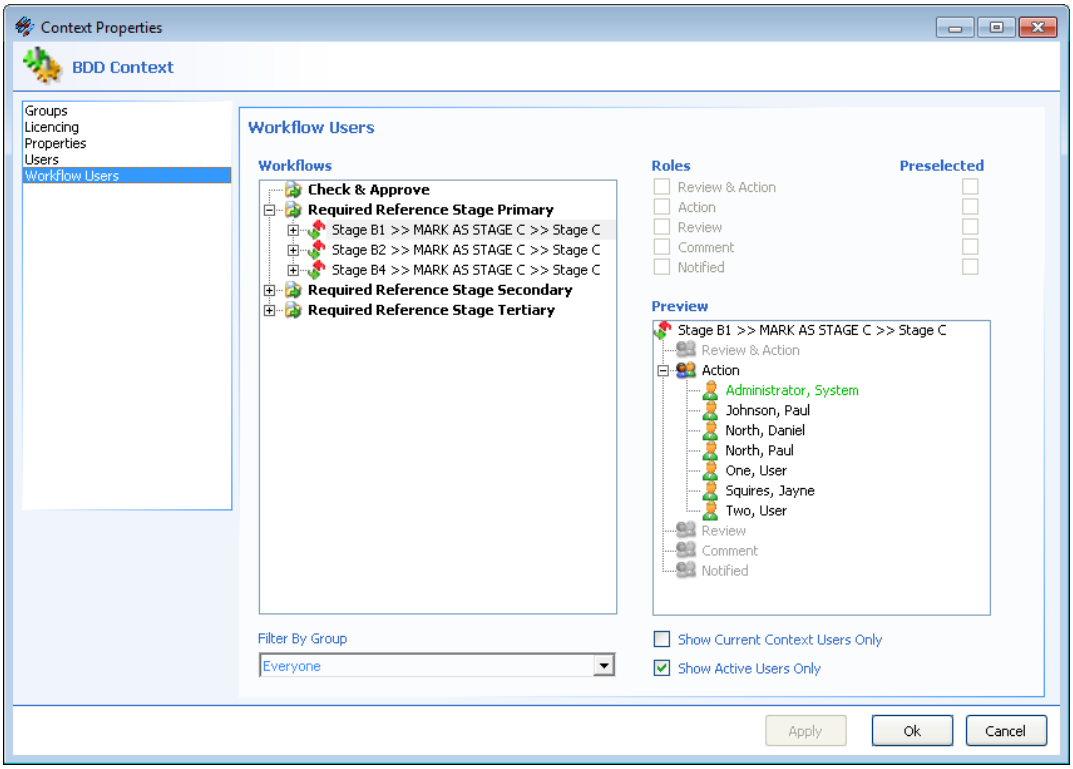


Figure 44

Select a group in the *Filter By Group* drop-down list to show users who are members of that group only.

Scroll to the required workflow and click the '+' button of the relevant stage to view the list of users assigned to that stage.

Viewing Users in Other Contexts
Clear the *Show Current Context Users Only* checkbox. Users in other Contexts are shown in blue text, or light blue if their account is disabled.

Viewing Users with Disabled Accounts

Clear the *Show Active Users Only* checkbox. Users in the current context with disabled accounts are shown in grey text.

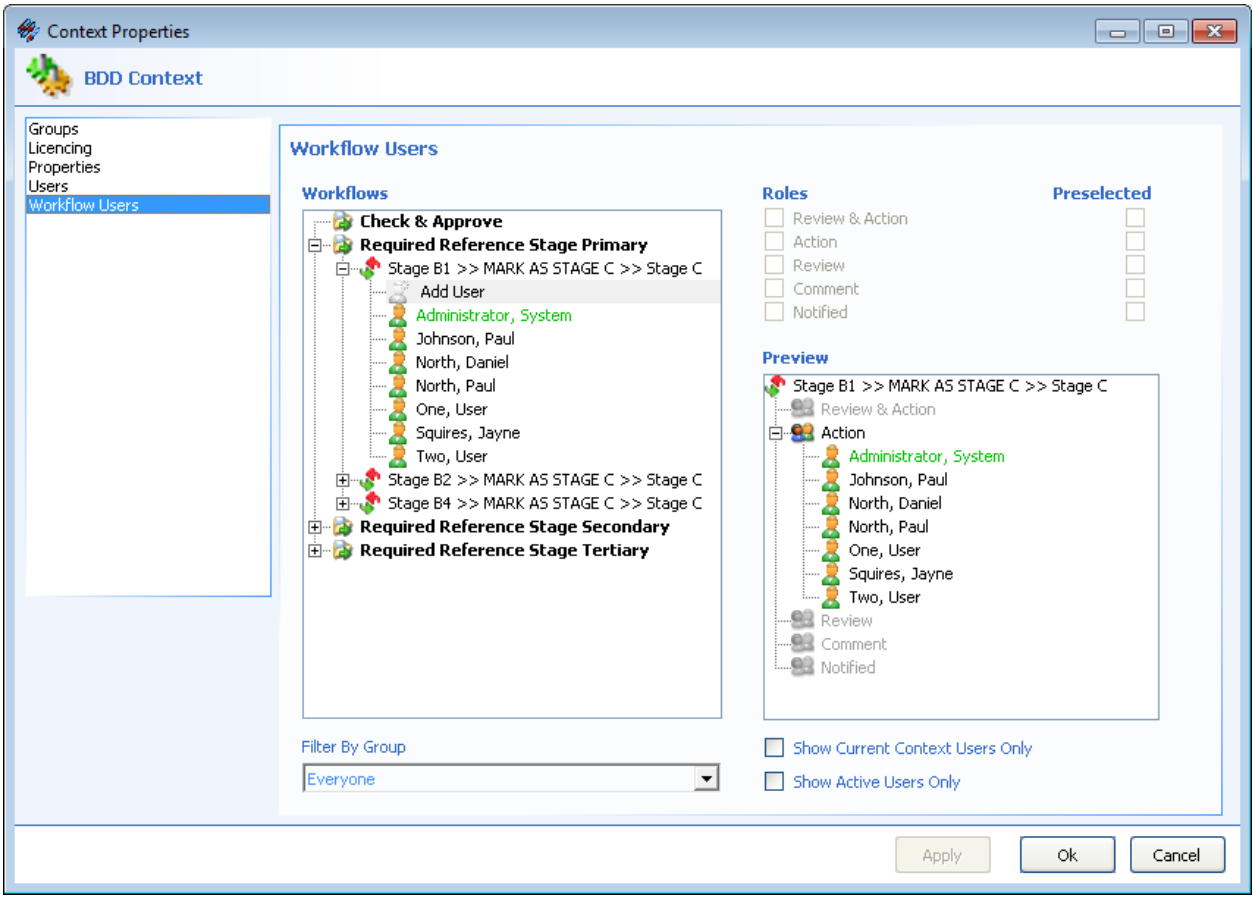


Figure 45

Single User

Double-click on *Add User,* select the new user from the list and click OK. The new user is listed in the workflow transition.

At this stage, the user's role is undefined, indicated by the icon:

Tick a suitable role or roles.

Tick the *Preselected* checkbox if the user should be pre-selected for this role. In this case, when nominating users for this transition, the user's checkbox will be ticked by default.

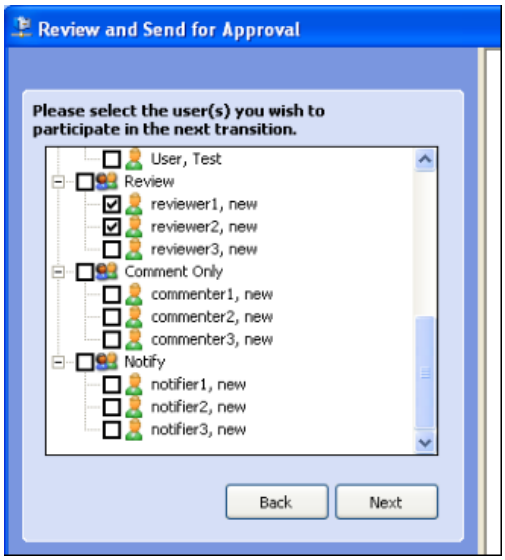


Figure 46

In the following example, the Preview pane shows the user's name added to the *Action* list.

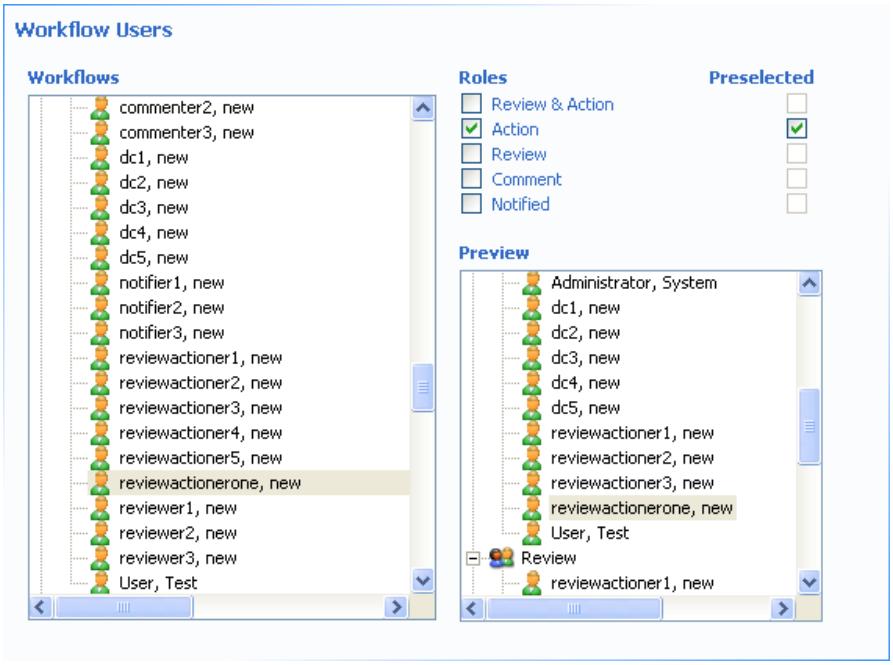


Figure 47

Click *Ok* to save the changes and exit the form.

Multiple Users

Double-click on *Add User,* select the users to be added and click *OK.*

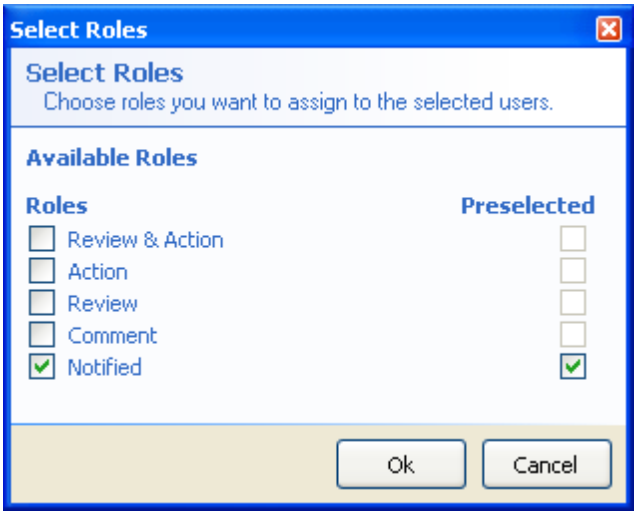


Figure 48

If the users are to have the same role or roles, select the appropriate checkboxes. If no roles are selected in this form, they must be selected individually when the users are added.

If the users should be pre-selected in the workflow transition's nomination page, tick the *Preselected* checkbox.

Click OK to add the users, roles and *Preselected* checkbox settings.

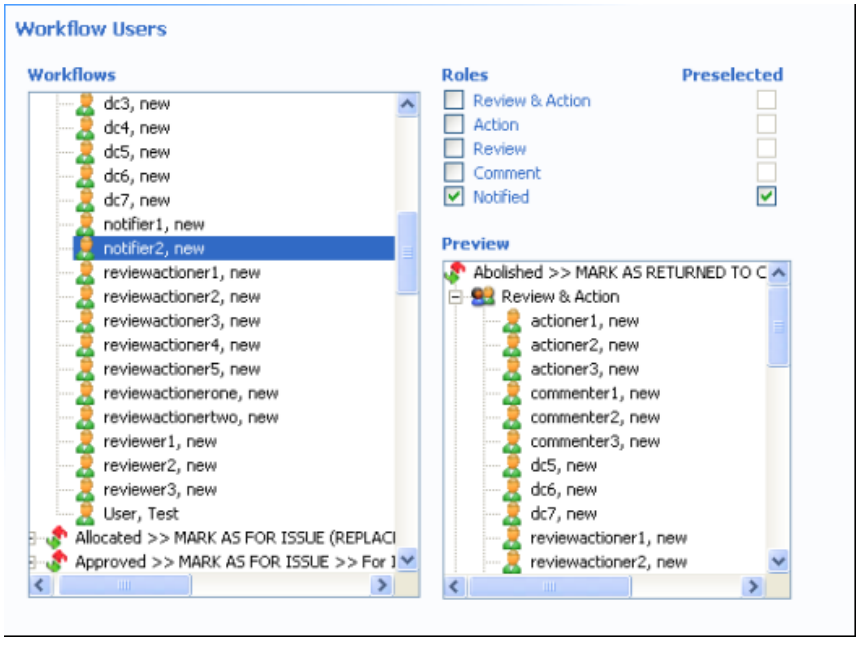


Figure 49

Folder Properties

To add a user to a workflow stage for a specific folder, right-click the folder, select *Properties* and select *Workflow Users* at the left of the form.

Select a group from the *Filter By Group* drop-down list to show users that are members of that group only, if required.

Expand the list of users for the required workflow stage.

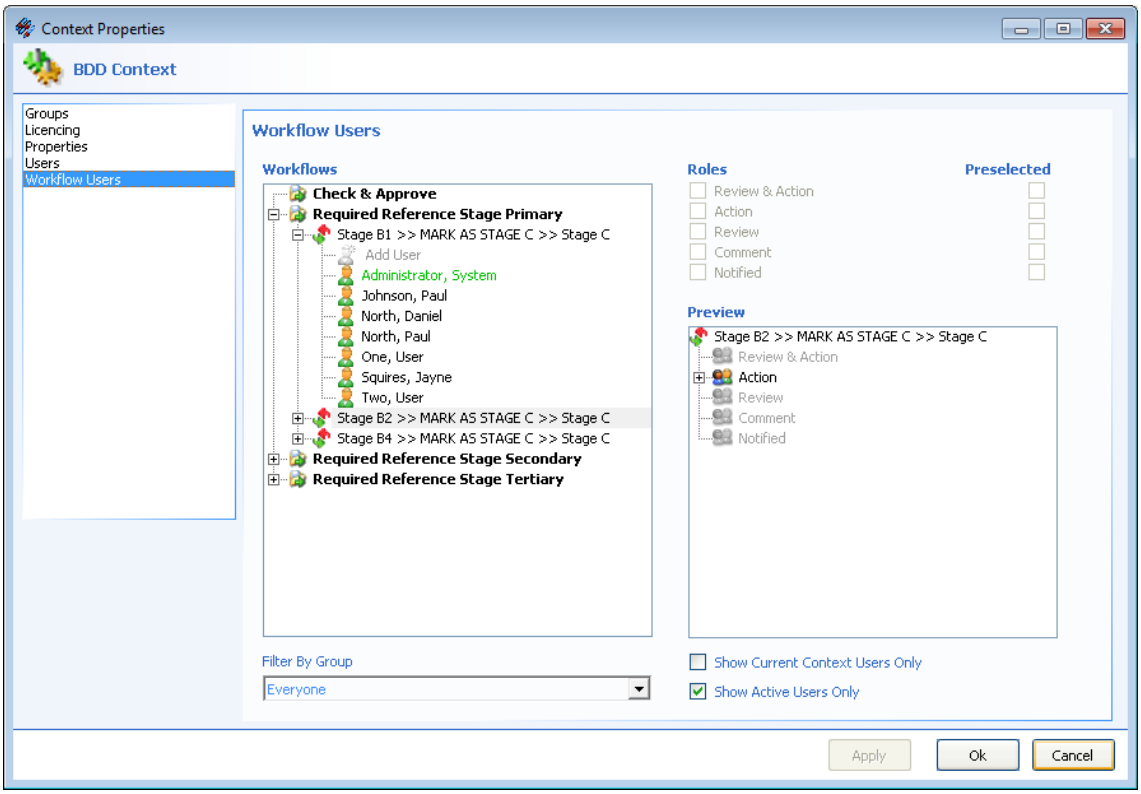


Figure 50

Select *Show Current Context Users Only* and/or *Show Active Users Only* as required.

Double click on *Add User*, select the user or users to be added and click *OK*.

Single User

If the user has been assigned to a single role, the *Roles* checkbox in the Folder Properties form is automatically ticked when the user is added.

If the user has been assigned to more than one role, tick the required role(s).

Click *Ok* to save and exit.

Multiple Users

If users have been assigned to more than one role, the *Select Roles* form is displayed.

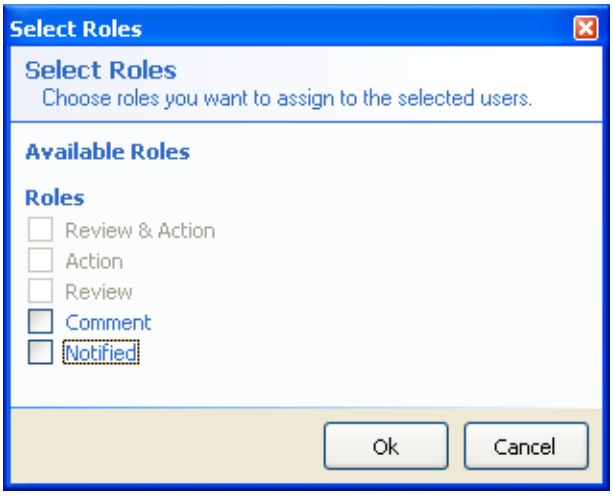


Figure 51

Tick the required role(s). If no roles are selected, they must be set for each individual user in the Workflow Users form.

Click OK to add the users and their role(s).

To inherit the *Workflow Users* settings of the parent folder, tick the *Inherit from Parent* checkbox.

Inherited users are shown with the icon:

Click *Ok* to save and exit.

Note: Only users and their assigned roles set up in the *Context Properties* form are available for selection for the corresponding workflow stage in *Folder Properties*.

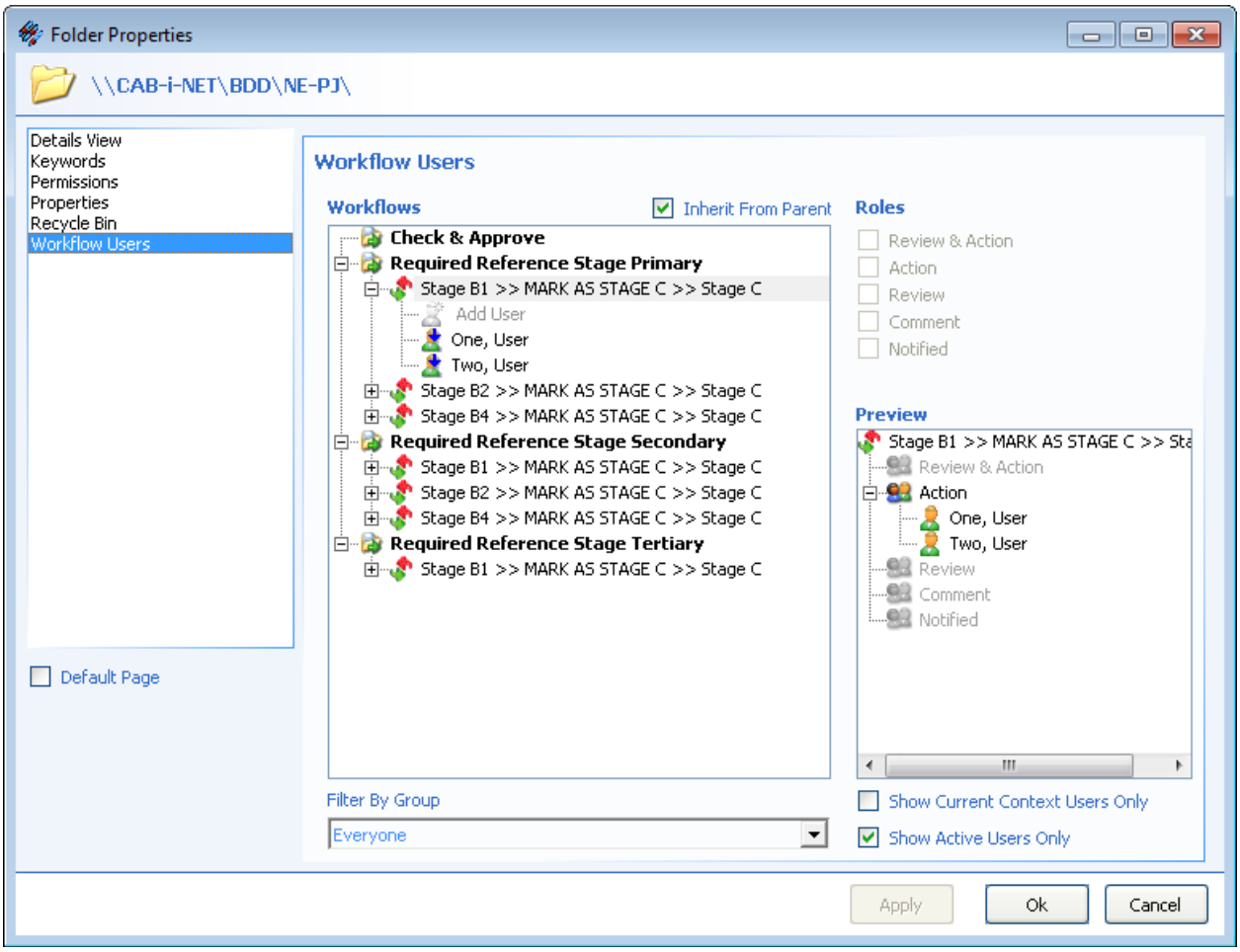
Deleting a user from a workflow

Context Properties

To delete a user from a workflow stage (or stages) in the Context Properties *Workflow Users* page:
Click on the context name.

Right-click and select Configure > [context name].
Select *Workflow Users* at the left side of the Context Properties form.

Scroll to the required workflow and click the '+' button of the relevant stage to view the list of users assigned to that stage.



Select *Show Current Context Users Only* and/or *Show Active Users Only* as required.

Right-click on the user to be deleted and choose either to remove that user or remove multiple users. If the *Remove Multiple Users* is chosen, highlight the users from the displayed list and click OK.

Folders Properties

To delete a user from a workflow stage for a specific folder:

Right-click the folder, select *Properties* and select *Workflow Users* at the left of the form.
Select *Show Current Context Users Only* and/or *Show Active Users Only* as required.

Expand the list of users for the required workflow stage.

Right-click the user to be deleted and choose either to remove that user or to remove multiple users, as described in *Context Properties* above.

Note that inherited users cannot be deleted, they are shown with the icon:

Click *Ok* to save and exit from the form.

Creating a new folder

Navigate to the required folder in the folders pane.

Either:
Click on *File* in the menu bar and select *New* > *Folder*.

Or

Right-click in the files / folders list and select *New* > *Folder*.

Or

Right-click in the folders pane and select *New* > *Folder*.

The *Create New Folder* form will be displayed. Enter the information in the following table, presented in two pages.

Folder Name	The name of the folder to be created.
Description	A description of the folder, if required.
Hidden	Tick the checkbox if the folder is to be visible to privileged users only.
Add / Delete Subfolders	Select one of the three options: • No-one • Permitted/Privileged Users • Privileged Users Only
Folder Type Group	Select the Folder Type Group for the required Folder Type (see below).
Folder Type	Select a folder type from the drop-down list. The folder type determines which documents can be created in this folder.
Numbering System	Select *Inherit from Parent* if the numbering system should be the same as that of the parent folder (the folder that holds this new folder being created). Otherwise, select the numbering system from the drop-down list.
Filename Prefix	Enter characters to be prefixed to document numbers.
Inherit Filename Prefix	Tick the checkbox if documents in this folder should have the same prefix characters.
Reference Prefix	Enter characters to be prefixed to document reference numbers.
Inherit Reference Prefix	Tick the *Inherit Reference Prefix* checkbox if documents in this folder should have the same Reference Prefix characters as the parent folder. They are shown to the left of the Reference Prefix entry fields, if the checkbox is ticked.
Inherit Keywords	Tick the checkbox if this folder should have the same Keywords as its parent folder. When entering Search Criteria, they can include searching by Keyword, allowing powerful searches to be set up.
Inherit Intents	Intents are selected to impose control over the types of files that can be created or imported in a folder. Tick the checkbox if this folder should have the same Intents as its parent folder.
Documents can be created in this Folder	Select this option to allow documents to be created. If this option is not selected, the folder can only hold subfolders.

Click *Finish* to create the new folder.

Using Favourites Folders

Frequently-used folders can be added to a *Favourites* list. This allows rapid navigation by selecting from the list.

Creating a Favourites Folder

Select the folder to be added to the favourites list in the folder tree.

Either:

- Right-click on the folder and in the menu, select *Add to Favourites.*

Or

- Click *Favourites* in the menu bar and select *Add to Favourites.*

Or

- Click the *Favourites* button so that it is highlighted.

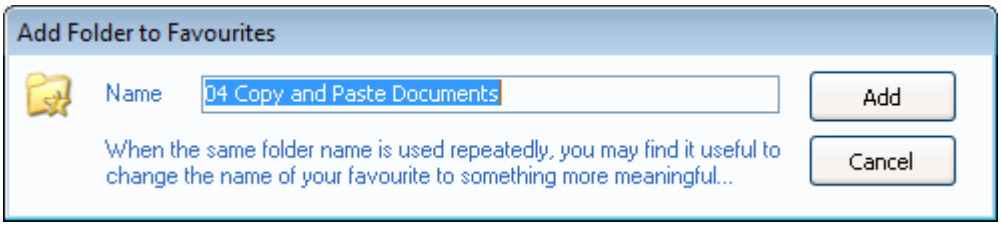

Add Folder to Favourites
Name
04 Copy and Paste Documents
Add
Cancel
When the same folder name is used repeatedly, you may find it useful to change the name of your favourite to something more meaningful...

Figure 52

Rename the favourite folder as required, to avoid similar names appearing in the favourites list. (Note that the actual folder name in Cabinet Explorer is unaffected).

Navigating to a Favourites Folder

Click *Favourites* in the menu bar.

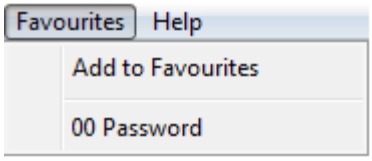


Figure 53

Select from the list to navigate to the folder.

Removing a Favourites Folder

Note that the favourite is removed, not the folder in Cabinet Explorer.

Select the folder in the folder tree, or select it in the favourites list to navigate to it.

Either:

- Right-click on the folder and in the menu select *Remove from Favourites*

Or

- Click *Favourites* in the menu bar and select *Remove from Favourites*.

Or

- Click the *Favourites* button so that the button is no longer highlighted.

Copying and Pasting a Folder

By default, subfolders are included in this operation, but not documents. The default behaviour can be edited as described below.

Right-click on the source folder and select *Copy.*

Right-click on the destination folder and select *Paste*.

Note that:

- The *Folder Name* and *Description* are copied from the source folder. Edit them as required.
- The *Prefix* and *Reference Prefix* are copied from the source folder. Edit them as required, for example to avoid unintentional duplication of numbering prefixes.
- If the folder structure, including a 30 character filename buffer, would exceed the Windows Explorer directory structure length restriction of 255 characters, a warning is displayed.
- In the last page of the wizard, if documents are to be included, the setting overrides the parent folder's *Documents can be created in this Folder* setting, if applicable.

Folder Naming using Tags

In the example shown below, various subfolders of the source folder include the name [*Pasted Folder Name*]. When the source folder is copied and pasted, the top-level folder name is substituted wherever *Pasted Folder Name* within square brackets appears in the folder tree.

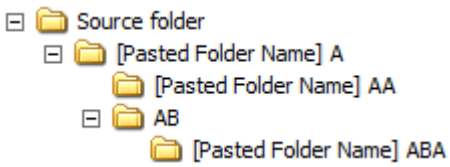


Figure 54

If the source folder is copied and pasted and renamed Project One, for example, this name is substituted as shown below.

Sets of folders with appropriate subfolder names can then be created by repeating the process with alternative folder names, Project Two, Project Three etc.

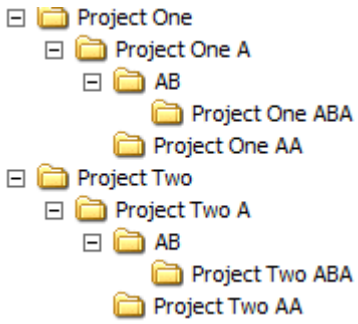


Figure 55

Folder and Document Auto-Numbering using Tags

The example below shows auto-numbering tags:

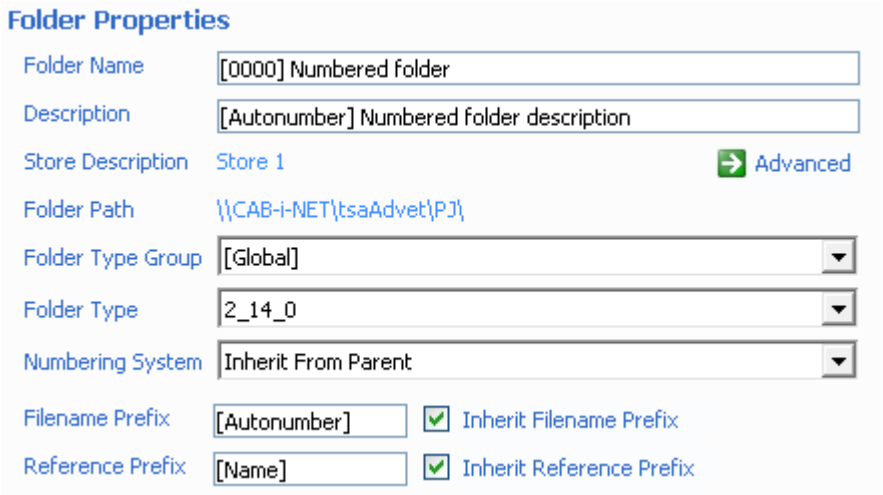


Figure 56

[0000]	When the folder is pasted, create the next available four-digit auto-number, i.e. the number of auto-number digits is determined by the number of digits in the tag.
<text>[0000] [0000]<text>	Text placed before or after the tag is copied without influencing the next available auto-number.
<text>[0000]<text>	If text is placed before **and** after the tag, the folder name is copied without change. It can be edited as required.
[Autonumber]	Substituted by the number created (see above).
[Name]	Substituted by the complete folder name (the number created and other text included in the folder name.

Example

If the next available number at the paste location is 0003, the Folder Properties when pasted are as shown.

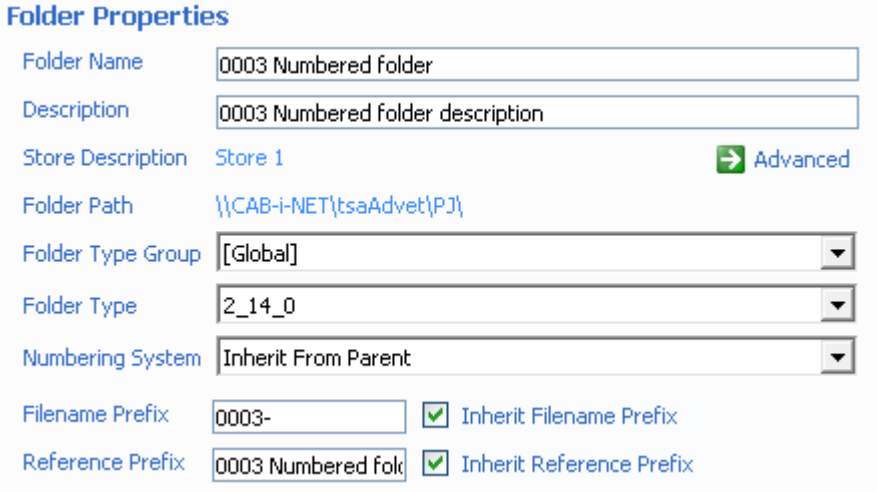


Figure 57

If documents are included in the paste operation or created in this folder, their *Filename Prefix* and *Reference Prefix* is as shown above. Note that auto-numbering only occurs in the top-level pasted folder.

Further control of auto-numbering is available by using the characters '~' and '='. Combinations of these characters can be used before **and** after the auto-numbering tag. In each case the number of digits in the tag is matched.

Folder name format	Increment basis
<prefix>=[00]	Matching prefix characters.
[00]=<suffix>	Matching suffix characters.
<prefix>~[00]	Matching number of prefix characters.
[00]~<suffix>	Matching number of suffix characters.
<prefix>=[00]=<suffix>	Matching prefix characters and matching suffix characters.
<prefix>~[00]~<suffix>	Matching number of prefix characters and matching number of suffix characters

Example

DEPT =[00]~PRJ

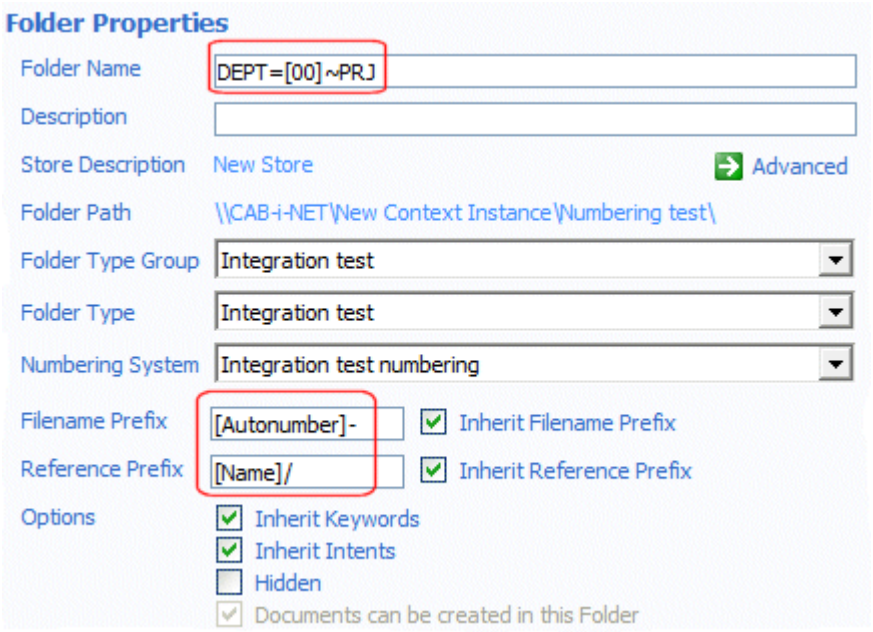


Figure 58

Documents are created in this folder with the *Filename Prefix*, in this case *[Autonumber]-.*

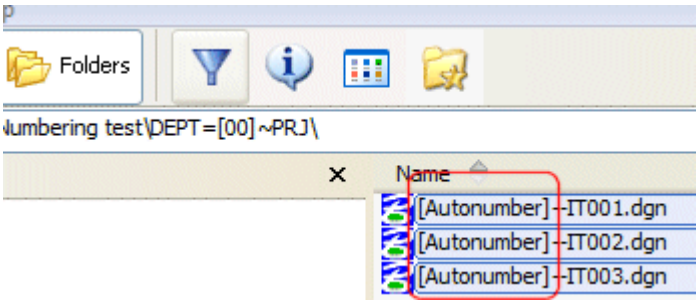


Figure 59

When pasting this folder, the auto-number value is determined in this case by matching the prefix characters *DEPT* and there must be any three suffix characters.

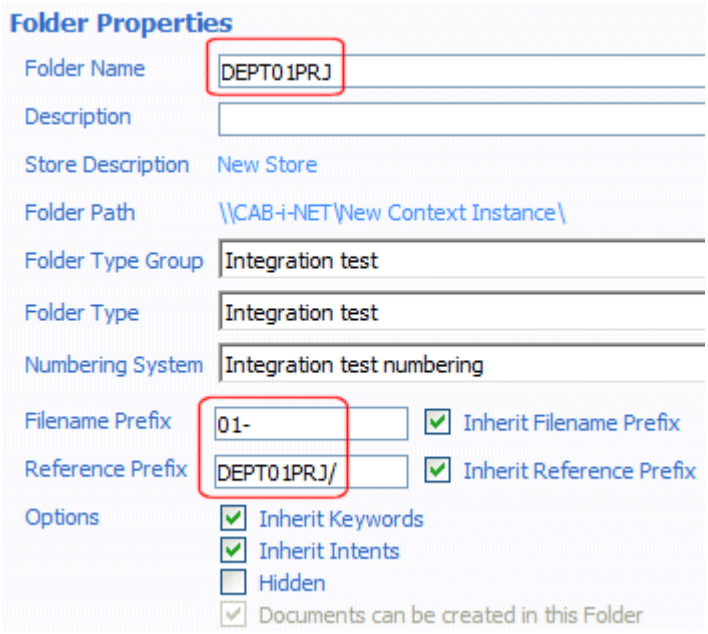


Figure 60

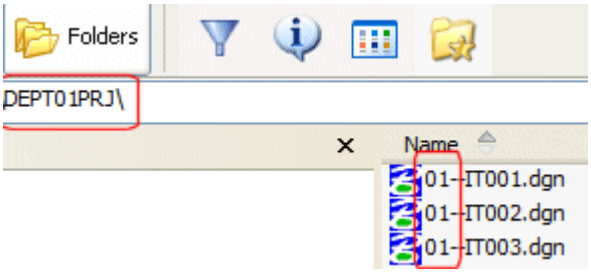


Figure 61

Cutting and Pasting a Folder

Right-click on the folder and select *Cut*.

Right-click on the destination folder and select *Paste.*

The folder, with its subfolders and documents, if documents are included when copying, are pasted to the new location.

When cutting and pasting folders containing checked out documents from a *Direct Share* (documents opened from the share location) to a *Normal Share*, it will no longer be possible to check in documents in the normal way.

Please ensure that the documents are checked in before performing the cut operation. Alternatively, privileged users can use *Force Check In* to return documents to the *Checked In* state after the cut operation.

This will not cause data loss, because a document on a *Direct Share* is always the latest version, and no changes can be made to the server version after it is moved to a normal share.

Editing the Details View of a Folder

Right-click on the required folder, select Properties from the menu and select Details View at the left of the form.

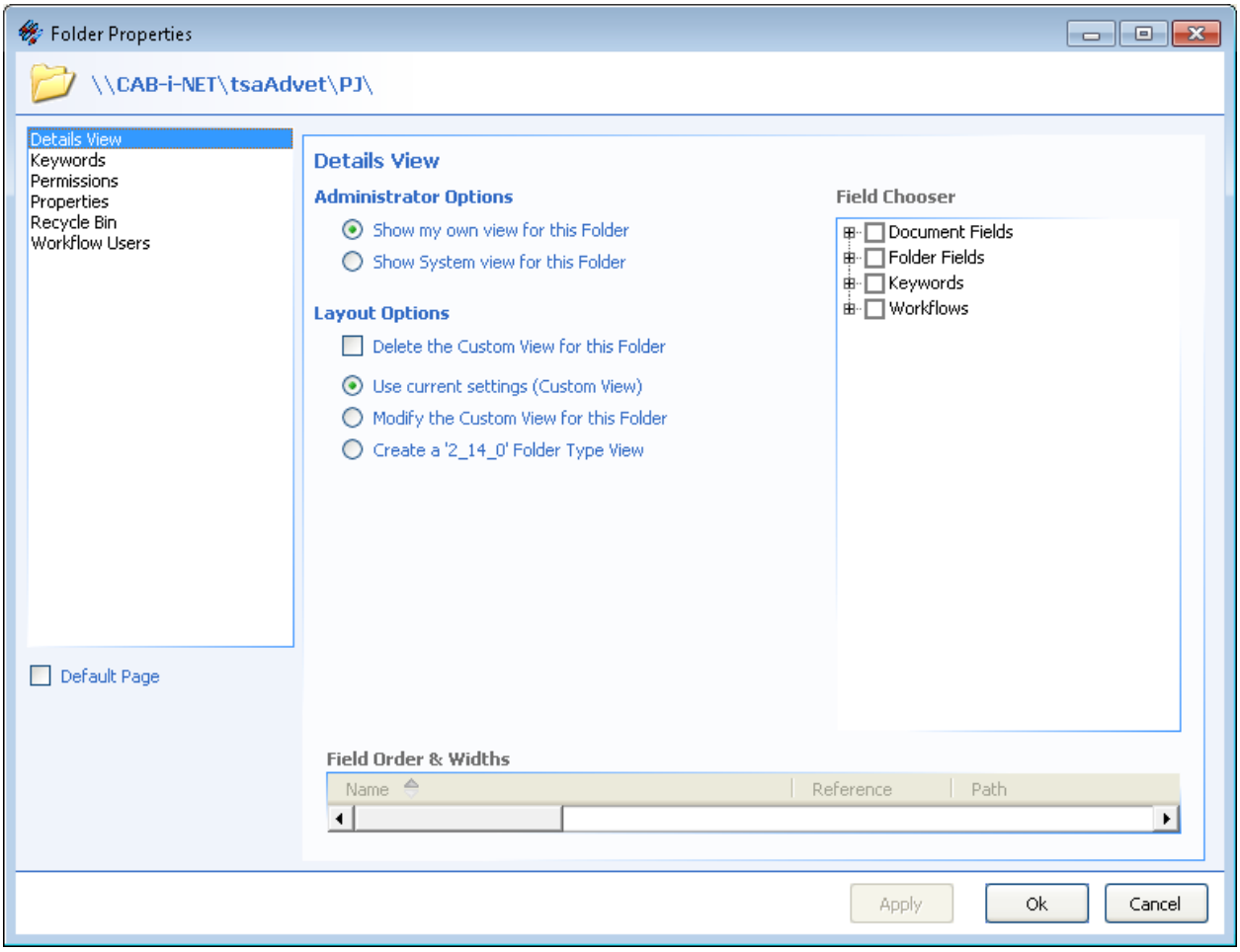


Figure 62

Administrator Options are only available to Administrators and users in groups with the *Change system listview layouts* privilege. Please Refer to Setting Group Privileges section for further details.

Administrator Options

Show my own view for this Folder	Show the user's own view of this folder. The view is determined by the Layout Options, see below.
Show System view for this Folder	The system view is the view displayed when *Use current settings (System Defined)* is selected. The system view applies when the user has no Folder Type View or Custom View selected. The view is determined by the Layout Options, see below. When the system-defined view is selected, administrators or users with the Change System Listview Layouts privilege may choose to apply it to all users, overriding their current view for that folder type or folder.

Layout Options

Use current settings (System Defined)	Show the system-defined view.
Create a Custom View for this Folder	Create the user's *Custom View* for the selected folder. If *Custom View* and a *Folder Type View* are both set up for the selected folder, the *Custom View* overrides the *Folder Type* settings.
Create a '<foldertype>' Folder Type View	Create the user's view for the selected folder's *Folder Type*. This view applies to any folder of this type, if *Folder Type* View selected for that folder.

The *Field Chooser* checkboxes and the *Field Order & Widths* can only be edited when an option to modify the settings is chosen.

Since the *Folder Type* settings apply to all folders with this Folder Type, unless a *Custom View* is set up for individual folders, it may be preferable to set up the *Folder Type* settings first (if the user wishes to change the system-defined settings). *Custom Views* can then be applied to specific folders, where both the system-defined and *Folder Type Views* are unsuitable.

The *Layout Options* available depend on the layout option that is currently selected.

If the Administrator Options are available to the user, their view is determined by the settings applied when *Show my own view for this Folder* is selected. In this case, the initial checkbox settings shown are a combination of the system-defined and the user's own view settings. Edit the checkbox settings as appropriate and click *OK* to save the changes. Note that the folder view returns to the user's own view after editing is completed.

If the folder currently shows the system-defined view, and no *Custom View* or *Folder Type View* is set up, the options are as shown below.

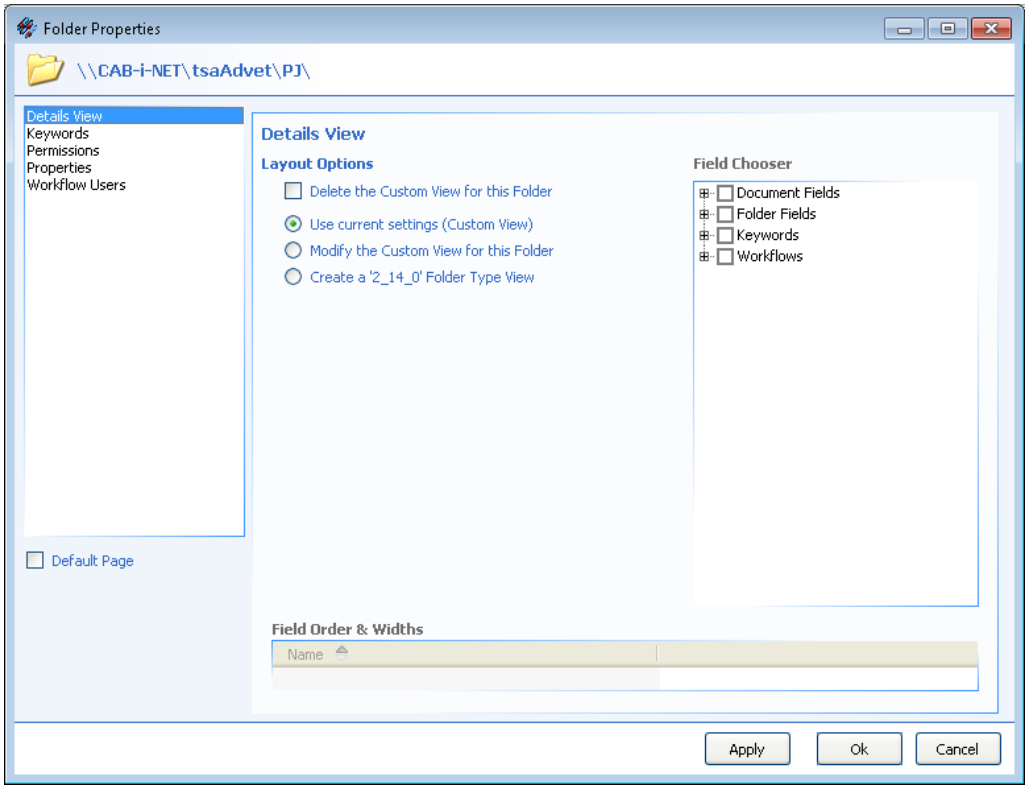


Figure 63

In the following description, '<>' represents the name of the *Folder Type* for the selected folder.

Creating a Folder Type View

Click on *Create a '<>' Folder Type View.*

Expand the checkbox lists in the *Field Chooser* and de-select any fields that are not required.

Select the required document fields, keywords, standard fields and workflow stages.

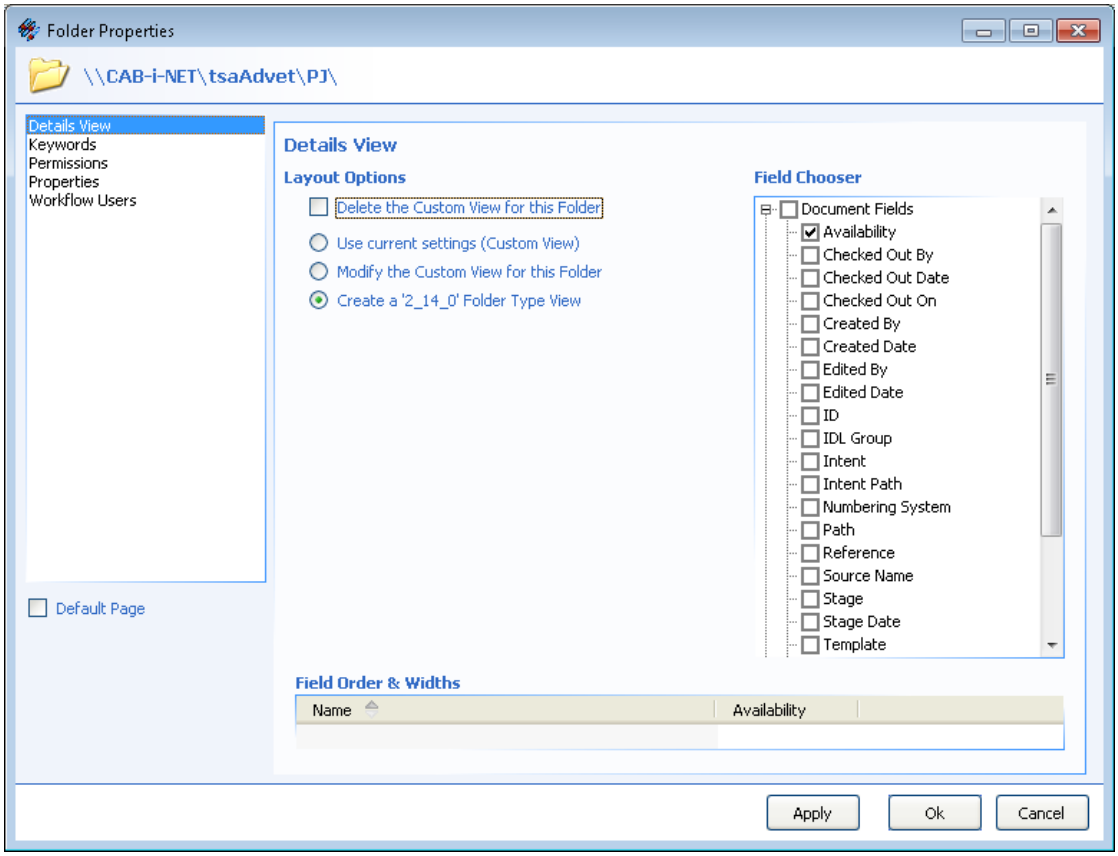


Figure 64

In the *Field Order & Widths* display, edit the column order as required, by dragging the cursor in a column header to a different position.

Adjust the column width as required, by positioning the cursor on the column separator line. When the cursor changes to a double-arrow, drag the line to a new position.

Select the column sorting by clicking the required column, so that an *Up* or *Down* arrow appears next to the column title. The arrow indicates ascending or descending order.

Click again in the column title to change the sorting direction.

Click *Apply* or *OK* to save the changes.

Editing a Folder Type View

When a *Folder Type View* has been set up for the selected folder, the Layout Options are as shown below.

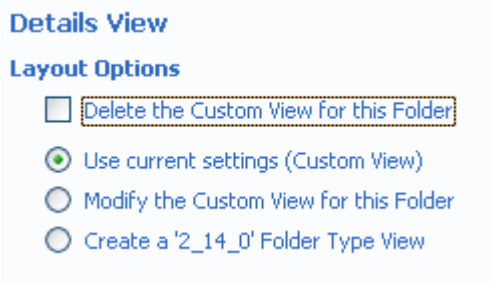

Details View
Layout Options
Delete the Custom View for this Folder
Use current settings (Custom View)
Modify the Custom View for this Folder
Create a '2_14_0' Folder Type View

Figure 65

Select *Modify my '<>' Folder Type View.*

Expand the checkbox lists in the *Field Chooser* and edit the checkbox settings as required.

Edit the column order, widths and sort order in the *Field Order and Widths* display as required.

Click *Apply* or *OK* to save the changes.

Deleting a Folder Type View

Select the *Delete the' <>' Folder Type View* checkbox.

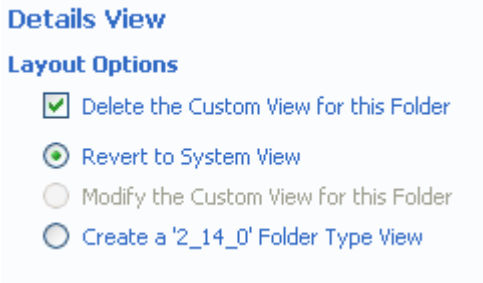

Details View
Layout Options
Delete the Custom View for this Folder
Revert to System View
Modify the Custom View for this Folder
Create a '2_14_0' Folder Type View

Figure 66

The *Revert to System View* option is displayed and selected by default. Either accept this option or select *Create a Custom View for this folder* and edit the *Field Chooser* checkboxes.

Click *Apply* or *OK* to save the changes.

After reverting to the system view, the Layout Options are as shown below.

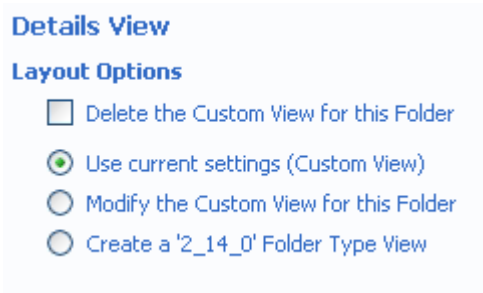

Details View
Layout Options
Delete the Custom View for this Folder
Use current settings (Custom View)
Modify the Custom View for this Folder
Create a '2_14_0' Folder Type View

Figure 67

Creating a Custom View

Click on *Create a Custom View for this Folder*.

Expand the checkbox lists in the *Field Chooser and* de-select any fields that are not required.

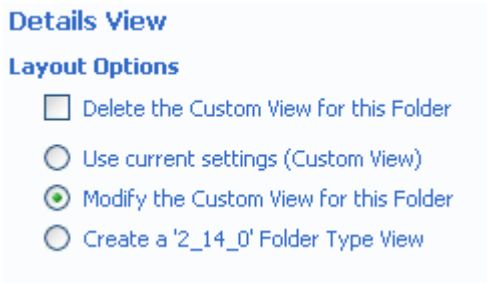

Details View
Layout Options
Delete the Custom View for this Folder
Use current settings (Custom View)
Modify the Custom View for this Folder
Create a '2_14_0' Folder Type View

Figure 68

Select the required document fields, keywords, standard fields and workflow stages.
In the *Field Order & Widths* display, edit the column order as required, by dragging the cursor in a column header to a different position.

Adjust the column width as required, by positioning the cursor on the column separator line. When the cursor changes to a double-arrow, drag the line to a new position.

Select the column sorting by clicking the required column, so that an *Up* or *Down* arrow appears next to the column title. The arrow indicates ascending or descending order.

Click again in the column title to change the sorting direction.

Click *Apply* or *OK* to save the changes.

Editing a Custom View

When a *Custom View* has been set up for the selected folder, the Layout Options are as shown below.

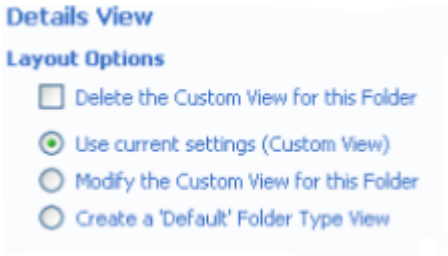

Details View
Layout Options
Delete the Custom View for this Folder
Use current settings (Custom View)
Modify the Custom View for this Folder
Create a 'Default' Folder Type View

Figure 69

Select *Modify the Custom View for this Folder.*

Expand the checkbox lists in the *Field Chooser* and edit the checkbox settings as required.

Edit the column order, widths and sort order in the *Field Order and Widths* display as required.

Click *Apply* or *OK* to save the changes.

Deleting a Custom View

Tick the *Delete the Custom View for this Folder* checkbox. The *Revert to System View* option is displayed and selected by default, as shown below.

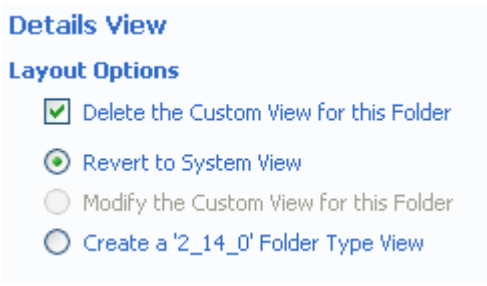

Details View
Layout Options
Delete the Custom View for this Folder
Revert to System View
Modify the Custom View for this Folder
Create a '2_14_0' Folder Type View

Figure 70

Either accept this default or select *Create a '<>' Folder Type View* and edit the *Field Chooser* checkboxes.

Click *Apply* or *OK* to save the changes.

Folder Type View and Custom View summary

The behavior when the user edits their own *Folder Type View* and the *Custom View* is summarized in the following tables.

Operation	Custom View created	Checkbox Settings	View	View in other folders
Create a Folder Type View	✗	Copied from system-defined view.	Changes from system view to Folder Type View.	Changes from system view to Folder Type View.
	✓	Copied from Custom View.	Custom View	Changes from system view to Folder Type View.
Modify a Folder Type View	✗	Folder Type View settings.	Folder Type View.	Folder Type View.
	✓	Copied from Custom View.	Custom View.	Folder Type View
Delete a Folder Type View	✗	If *Create a Custom View* is selected, the settings are copied from the Folder Type View.	Folder reverts from Folder View to system view, or if *Create a Custom View* is selected and set up, the Current View is shown.	Revert from Folder Type View to the system view.
	✓	Custom View	Custom View	Revert from Folder Type View to the system view.

Operation	Custom View created	Checkbox Settings	View	View in other folders
Create a Custom View	✗	Copied from system-defined settings.	Changes from system view to Custom view.	System view.
	✓	Copied from Folder Type View.	Changes from Folder View to Custom View.	Folder Type View.
Modify a Custom View	✗	The Current View settings.	Custom View	System view.
	✓	The Current View settings	Custom View	Folder Type View
Delete a Custom View	✗	If Create a Folder Type View is selected, the settings are copied from the Custom View.	Reverts from Custom View to system view, or if Create a Folder Type View is selected, the Folder Type View is shown.	System view, or if a new Folder Type View is created, the Folder Type view.
	✓	Custom View	Reverts from Custom View to Folder Type View	Folder Type View.

Editing the Details View of a Search

Before editing the details view of a search, the search must be run, otherwise the columns for the documents in the current folder are displayed.

When running a search, select an appropriate folder from which to start, taking into account the search time from a top-level folder if many subfolders and documents exist.

Click the *Search* button to display the *Saved Searches* pane.

System Searches

The *Details View* of *System Searches* can only be modified if the user is an Administrator or a member of a group with the privilege to modify a system search.

Run the *System Search* and in the column header of the document list, right-click and select *Show* > *More…*

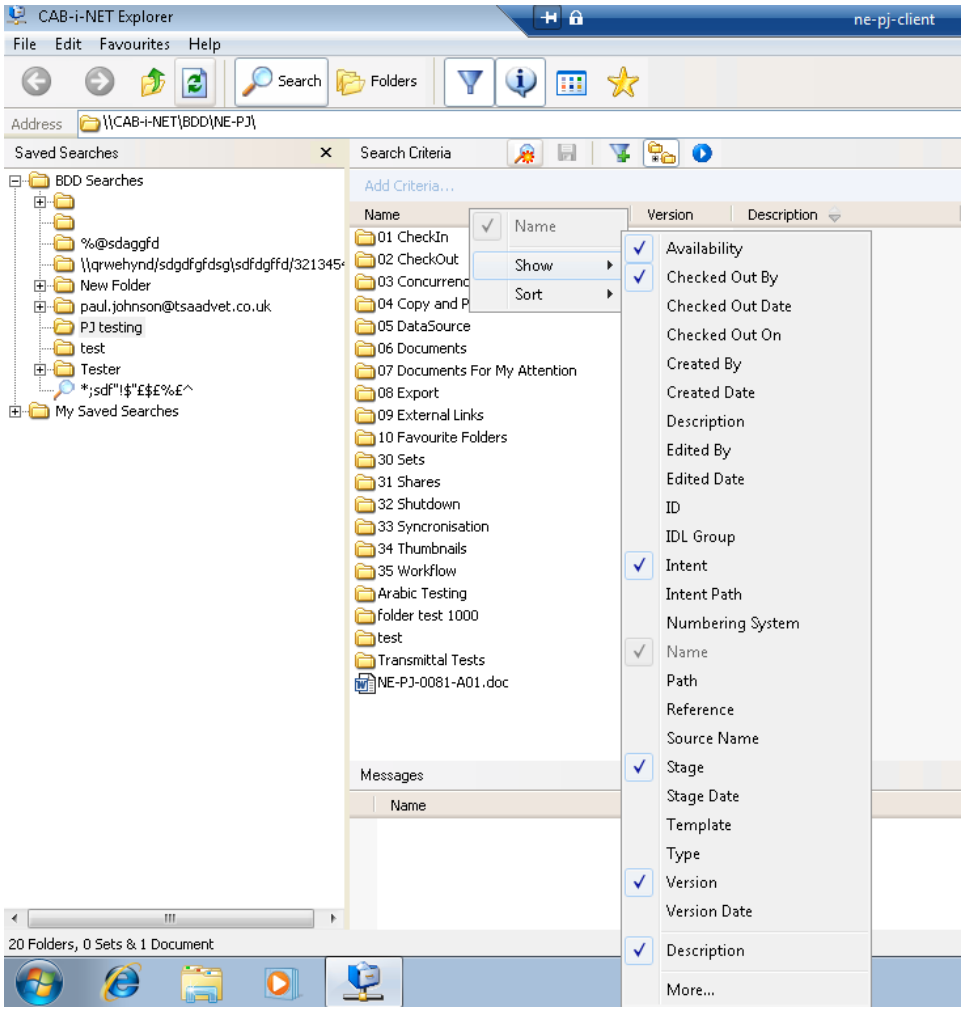


Figure 71

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Modifying the System Default Search View

Select the *Modify the System Default Search View* button and expand the *Field Chooser* checkbox lists.

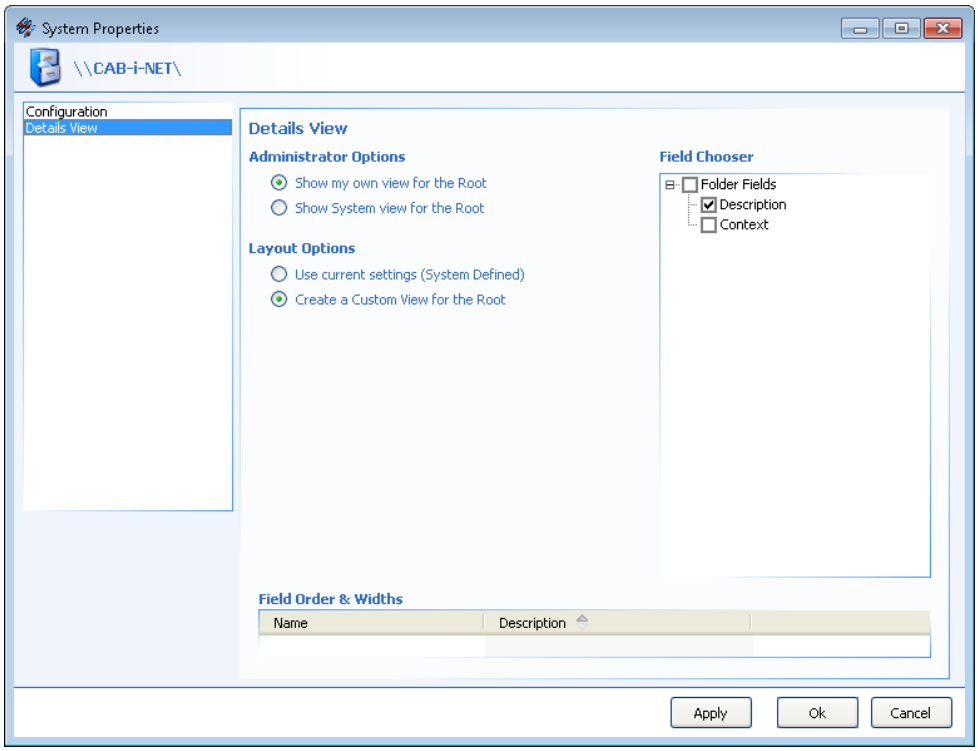


Figure 73

Tick the required fields and in the *Field Order & Widths* display, drag the column names to re-order them and adjust the column widths as required.

Click *Apply* or *Ok* to save the changes.

The new layout is visible to all users in all system searches except where System Custom Views are selected, and in user's searches if no Default Search View or Custom View is selected.

Notes:

1. Columns may be added to a System Default View by right-clicking in the column header, selecting Show and ticking the required columns in the menu. In this case, a *System Custom View* is automatically created and selected.

2. If the column order of a *System Default Search View* is edited by dragging the column headers in the search results list, a *System Custom View* is automatically created and selected if the user is an Administrator or a user in a group with the *Modify System Searches* privilege. Other users may temporarily edit the column sequence, but the change is lost when another search is run.

3. If a *Custom View* is currently selected, it remains visible for this search after the *System Default Search View* is edited.

Creating a System Custom View

Click the *Create a Custom View for this Search* button.

Tick the required fields and in the *Field Order & Widths* display, drag the column names to re-order them and adjust the column widths as required.

Click *Apply* or *Ok* to save the changes.

The new layout is visible to all users when the selected *System Search* is run.

When a *Custom View* is selected, the Layout Options are as shown below.

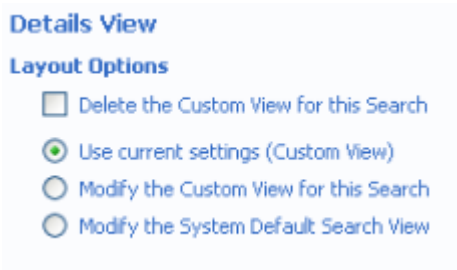

Details View
Layout Options
Delete the Custom View for this Search
Use current settings (Custom View)
Modify the Custom View for this Search
Modify the System Default Search View

Figure 74

Modifying a System Custom View

When a *System Custom View* is selected, the *Layout Options* are as shown above.

Select the *Modify the Custom View for this Search* button, edit the *Field Chooser* checkbox settings, the *Field Order and Widths* and click *Apply* or *Ok* to save the changes.

Deleting a System Custom View

If a *System Custom View* is currently selected, the *Layout Options* are as shown above.

Select the *Delete the Custom View for this Search* checkbox.

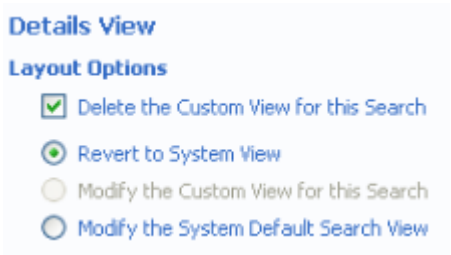

Details View
Layout Options
Delete the Custom View for this Search
Revert to System View
Modify the Custom View for this Search
Modify the System Default Search View

Figure 75

Select one of the options:

- Revert to System View.
- Modify the System Default Search View. In this case, edit the checkboxes, field order and widths and click *Apply* or *OK.*

My Saved Searches

A user's saved searches are shown in the *My Saved Searches* list.

Click on the required search and run it, so that the search result columns are displayed, instead of the columns for the documents in the current folder.

In the column header of the search results list, right-click and select *Show* > *More…*

The *Search Properties* form is displayed as shown below.

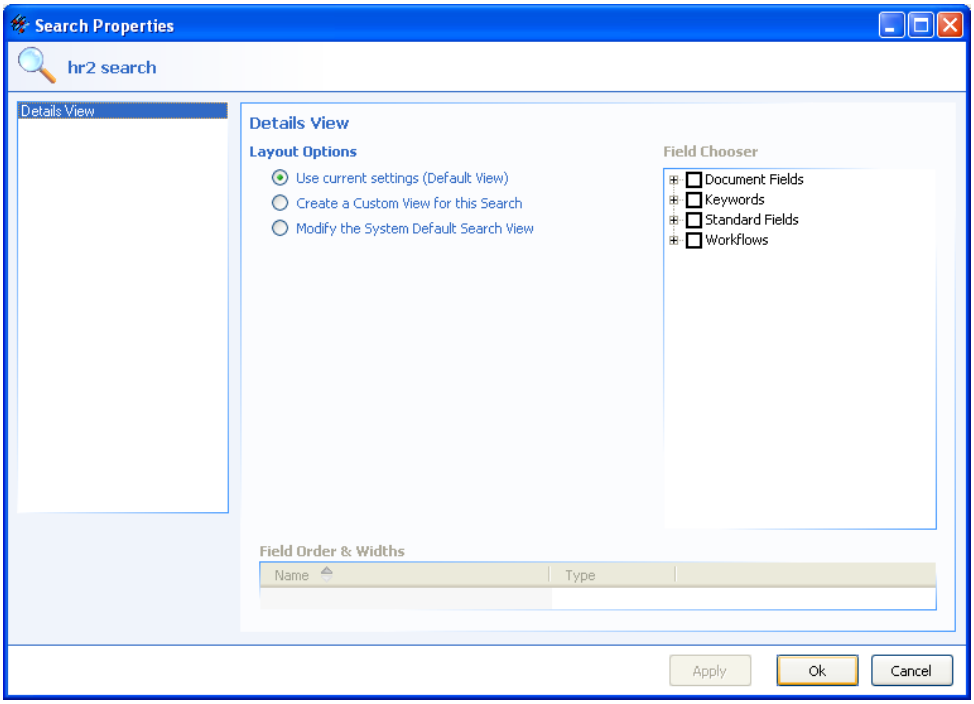


Figure 72

If no *Custom View* is set for the current search, the *Layout Options* are as shown above

Creating a Default Search View

If a user does not create a *Default Search View,* the *System Default View* applies, unless a *Custom View* is selected.

A *Default Search View* applies to all the user's saved searches, where no *Custom View* is selected.

Select the *Create a Default Search View* button and expand the *Field Chooser* checkbox lists.

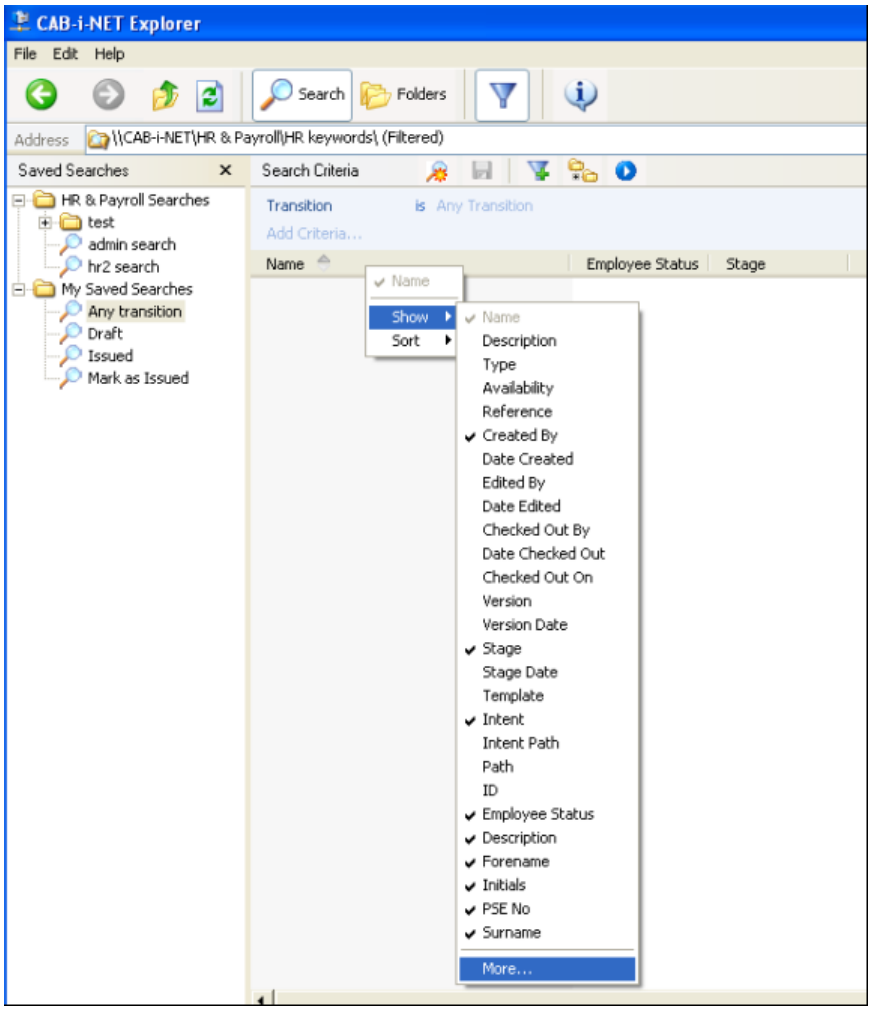


Figure 73

Tick the required fields and in the *Field Order & Widths* display, drag the column names to re-order them and adjust the column widths as required.

Click *Apply* or *Ok* to save the changes.

The new layout is visible in all the user's searches, where a Custom View is not selected.

Notes:

If a *Custom View* is currently selected, it still applies for this search after the *Default Search View* is edited.

If the column sequence is edited by dragging column headers in the search results list, or if additional columns are added by right-clicking in the column headers, selecting Show and ticking items in the menu, a Custom View is automatically created and selected for this search.

Modifying a Default Search View

If a user has created a *Default Search View*, the *Layout Options* are as shown below.

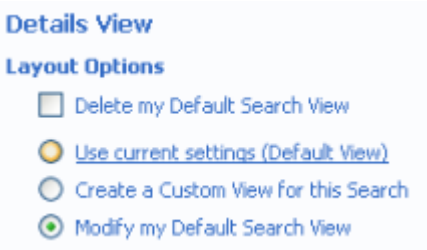

Details View
Layout Options
Delete my Default Search View
Use current settings (Default View)
Create a Custom View for this Search
Modify my Default Search View

Figure 74

Select *Modify my Default Search View,* select the Field Chooser checkboxes, select the column order and widths in the *Field Order &Widths* display and click *Apply* or *OK* to save the changes.

Deleting a Default Search View

If the user has created a *Default Search View* but not a *Custom View*, the *Layout Options* are as shown above.

Tick the *Delete my Default Search View* checkbox.

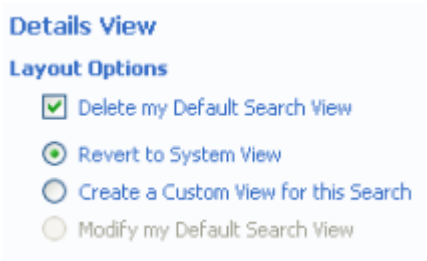

Details View
Layout Options
Delete my Default Search View
Revert to System View
Create a Custom View for this Search
Modify my Default Search View

Figure 75

Select one of the options:

- Revert to System View
- Create a Custom View for this Search. In this case, select the required checkboxes in the *Field Chooser,* set the column order and widths in the *Field Order & Widths* display and click *Apply* or *OK* to save the changes.

Creating a Custom View

If no *Default Search View* has been created, the *Layout Options* are as shown below.

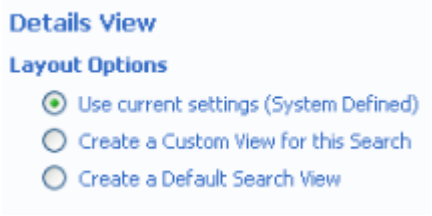

Details View
Layout Options
Use current settings (System Defined)
Create a Custom View for this Search
Create a Default Search View

Figure 76

Click the Create a Default Search View button.

In the Field Chooser, expand the checkbox lists.

Tick the required checkboxes, set the field order and widths, and click Apply or OK to save the changes.

The user's Custom View applies to the selected search in the My Saved Searches list.

Editing a Custom View

When a *Custom View* has been created, but not a *Default Search View*, the *Layout Options* are as shown below.

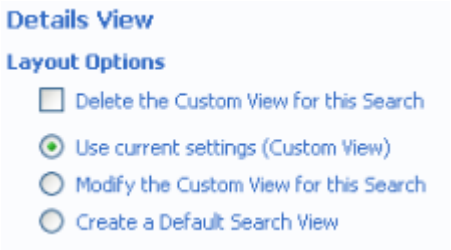

Details View
Layout Options
Delete the Custom View for this Search
Use current settings (Custom View)
Modify the Custom View for this Search
Create a Default Search View

Figure 77

Click the *Modify the Custom View for this Search* button, select the required checkboxes in the *Field Chooser*, set the column order and widths and click *Apply* or OK to save the changes.

Deleting a Custom View

When a *Custom View* has been created, but not a *Default Search View*, the Layout options are as shown above.

Tick the *Delete the Custom View for this Search* checkbox.

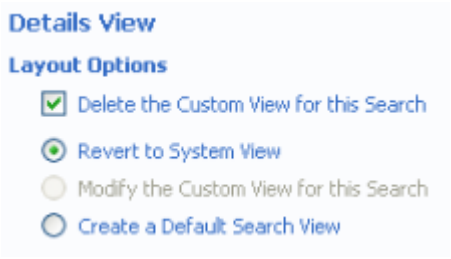

Details View
Layout Options
Delete the Custom View for this Search
Revert to System View
Modify the Custom View for this Search
Create a Default Search View

Figure 78

Select one of the options:

- Revert to System View
- Create a Default Search View.

In this case, edit the *Field Chooser* checkboxes, *Field Order and Widths* and click *Apply* or *OK* to save the changes. The *Default Search View* applies to all the user's searches in the *My Saved Searches* list, where no *Custom View* is selected.

Editing Folder Keywords

Right-click on the required folder, select Properties from the menu and select Keywords at the left of the form.

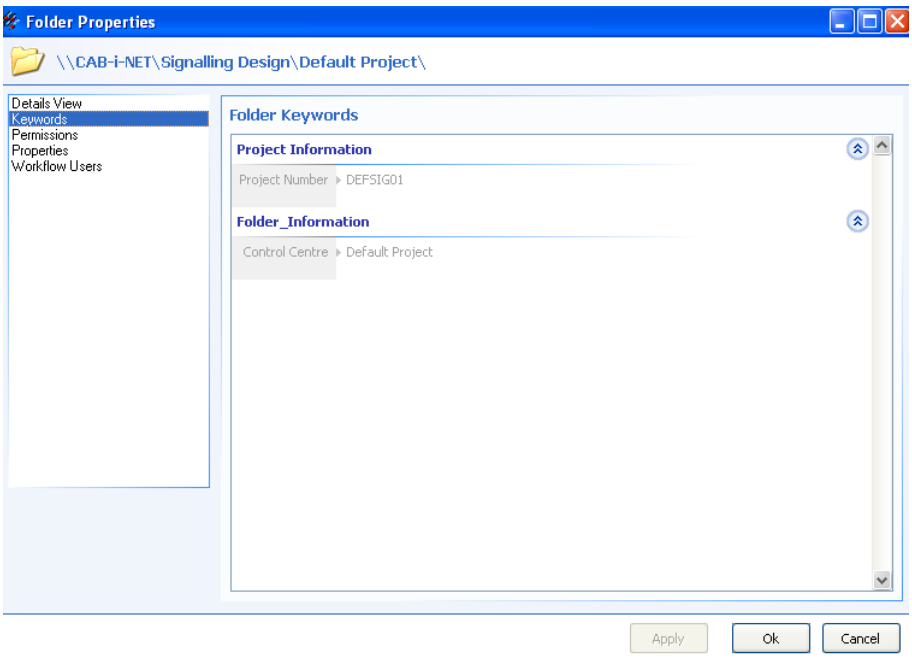


Figure 79

Keywords can be used as Search Criteria, see page 14. Folder keywords may be single value, multi-value or date fields. Refer to Figure 118 for further details.

Selecting Folder Keywords from an External Data Source

Depending on configuration, folder keywords can be populated from an external data source. In this case, a button is displayed as shown, for the relevant keyword group.

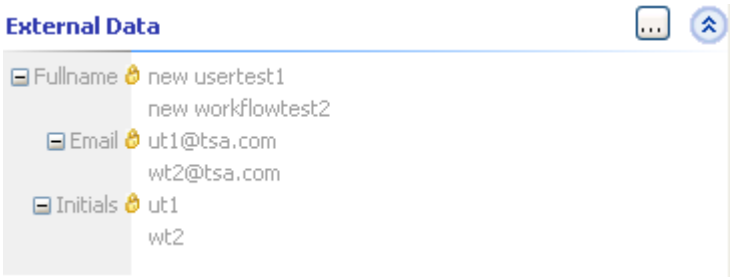


Figure 80

Note that the keyword values from an external data source are always locked for editing, as shown.

Click the button and select the required external data rows. Multiple selections may be made, if all the relevant keywords are multi-value types.

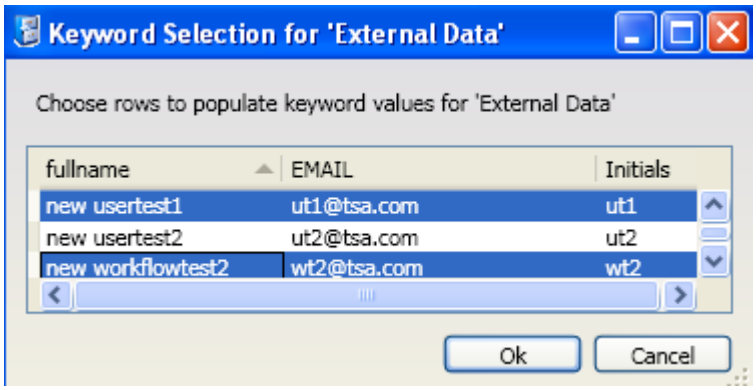


Figure 81

Click *OK* to populate the keywords.

Setting Permissions

The Permissions page allows editing of group permissions to perform the following functions:

- List Contents
- Modify Folder
- Delete Folder
- Change Permissions
- Create Subfolders
- Delete Subfolders
- Create Documents
- Delete Documents
- Modify Documents
- Preview Documents
- View Published Documents
- View Revised Documents
- Workflow Documents
- Permissions can be set using the same method at the Instance or folder level.

Instance Permissions

Edit permissions at the Instance level by right-clicking the Instance name, select Properties > Permissions.

Folder Permissions

Edit permissions at the folder level by right-clicking the folder, and select *Properties* > *Permissions*. Folder permissions can be inherited from the parent folder if required.

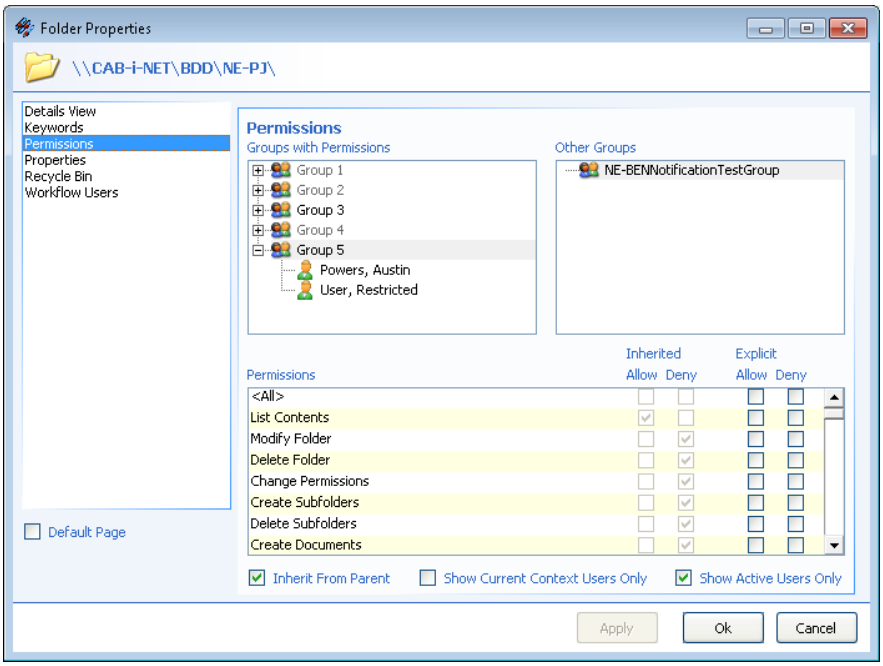


Figure 82

The Permissions page shows Groups with Permissions and Other Groups.

- Select Show Current Context Users Only and/or Show Active Users Only as required.
- Folder Permissions are inherited from the parent if the checkbox is ticked.
- If a user creates a subfolder in a folder with Inherit Permissions disabled, the subfolder has Inherit Permissions enabled by default, to set the same permissions as the parent folder.
- Groups with inherited permissions are shown in grey, and groups with permission settings for this folder are shown in bold.
- Click on a group name to view that group's permissions and view its members.
- To set the permissions of a group in the *Other Groups* list, click on it and drag it across to the *Groups with Permission*s list. To set each permission and override the inherited permissions (if applicable), tick the appropriate Explicit Allow / Deny checkboxes.
- The Workflow Documents permission is required to enable the Workflow menu in the user's document right-click menu.
- Users with roles assigned in the *Workflow Users* page and with *Workflow Documents* permission are listed in the workflow role-assignment form.

If access to a folder is denied, the folder is shown with a red symbol:

Creating a new document

Navigate to the required folder in the folders pane.

Either:

- Click on *File* in the menu bar and select *New* > *Document.*

Or

- Right-click in the files / folders list and select *New* > *Document.*

Or

- Right-click in the folders pane and select *New* > *Document.*

The Create Document Wizard will be displayed.

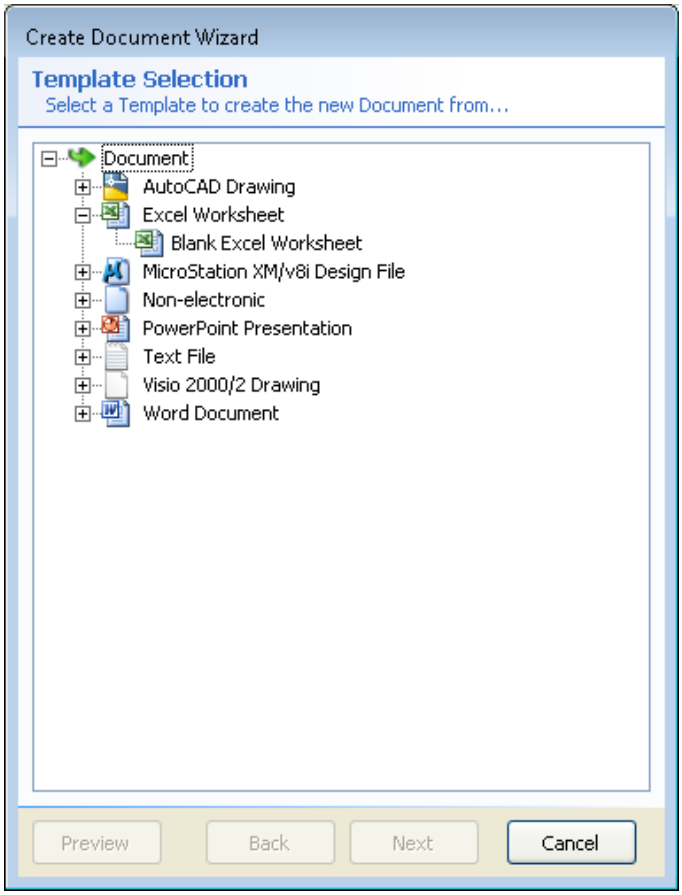


Figure 83

Expand the Intents tree and click on the required file template.

Click *Preview* to view the template file, if applicable.

Click *Next* to go to the next page of the Create Document Wizard.

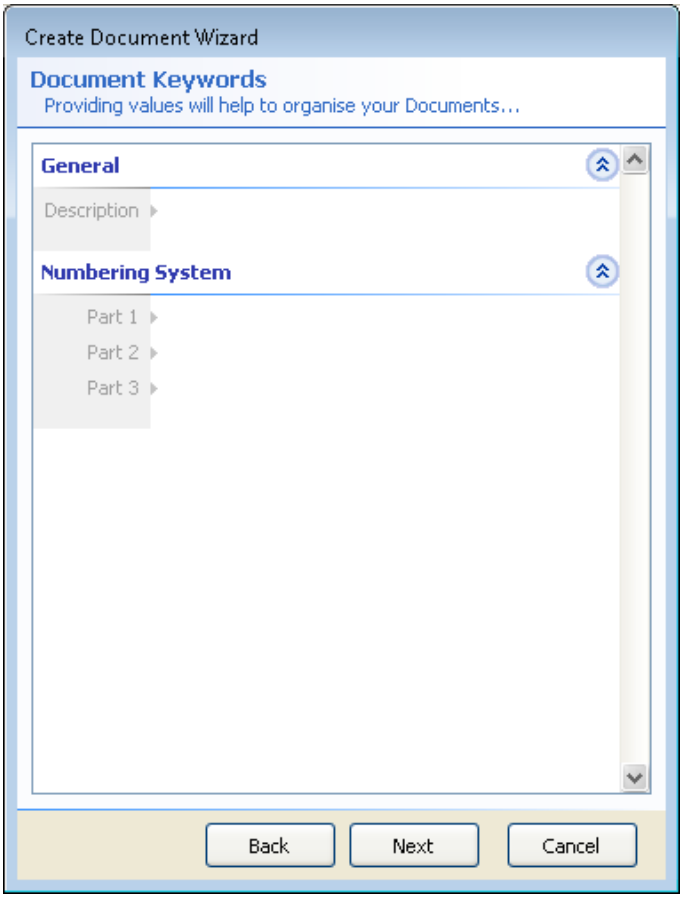


Figure 84

Depending on the configuration for documents in this folder, a list of keywords will be displayed, with Keyword Group names shown in bold. Entries are required for Keywords shown with a red arrow and optional for Keywords with a blue arrow.

Note that depending on the configuration of the selected numbering system, keyword values may contribute to the document number. Numbering systems are described in the *Cabinet Administrator User Guide*.

On the next page, Filename and Reference:

If the numbering system is free type, enter the document's filename and reference and click *Next.*

Note that:

- The number of characters may be limited to the maximum configured for the free type numbering system that applies to that folder.
- If the checkbox is ticked (see below), either during or after text entry, the filename is copied to the reference name.

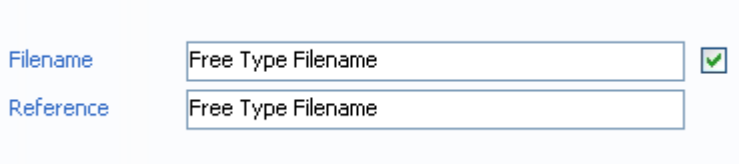


Figure 85

If the numbering system is not free type:

- Select numbering system options as required.
- Click Reset to return characters to their original value if required.
- Select the number of document copies that are to be created, and click *Next*.

The *Final Confirmation* page shows the document numbers which will be created from these settings.

If a document has the same name or number as a document in the recycle bin, a warning is displayed on the Final Confirmation page. If Finish is clicked, the document in the recycle bin will be automatically deleted. Alternatively, rename or renumber the new document to retain the document in the recycle bin.

Click *Finish* to create the documents, which will be shown in the folders / files list.

Replace Document

Replace with a File

This section guides you through the functionality of *Replacing a Document* within Cabinet Explorer system.

You have two ways in which to replace a document. Navigate to your chosen file that you want to replace, right click on the file and select the properties options.

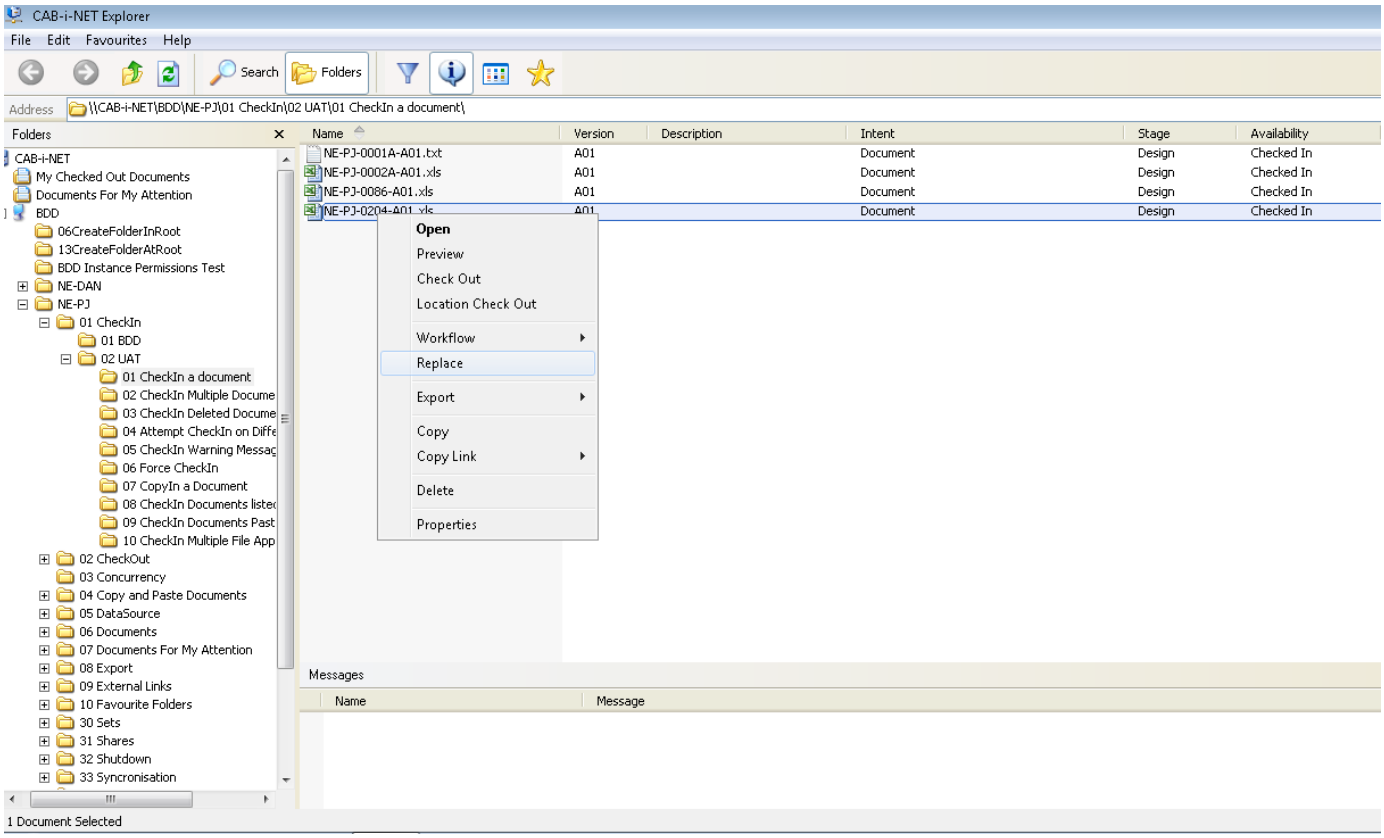


Figure 86

Once the Replace option has been selected the Replace File window will be displayed (see below) select the Replace File option.

Once you have clicked on the Replace File option, the Replace File window will be displayed (see below).

The Replace File screen.

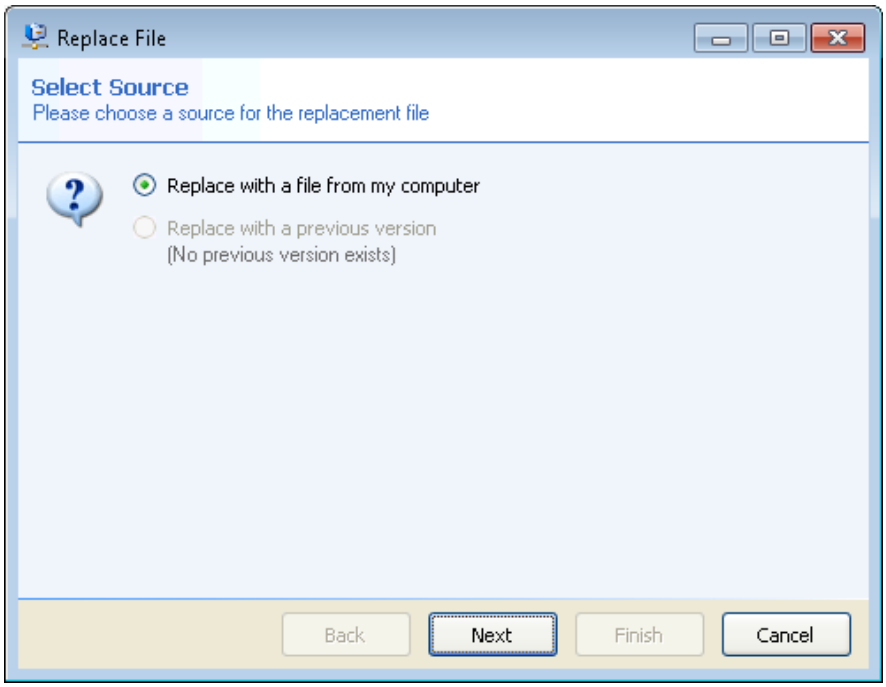


Figure 87

Leave the default selection and then click on the Next button, the Replace File (Filetype Selection) window is displayed, (see below).

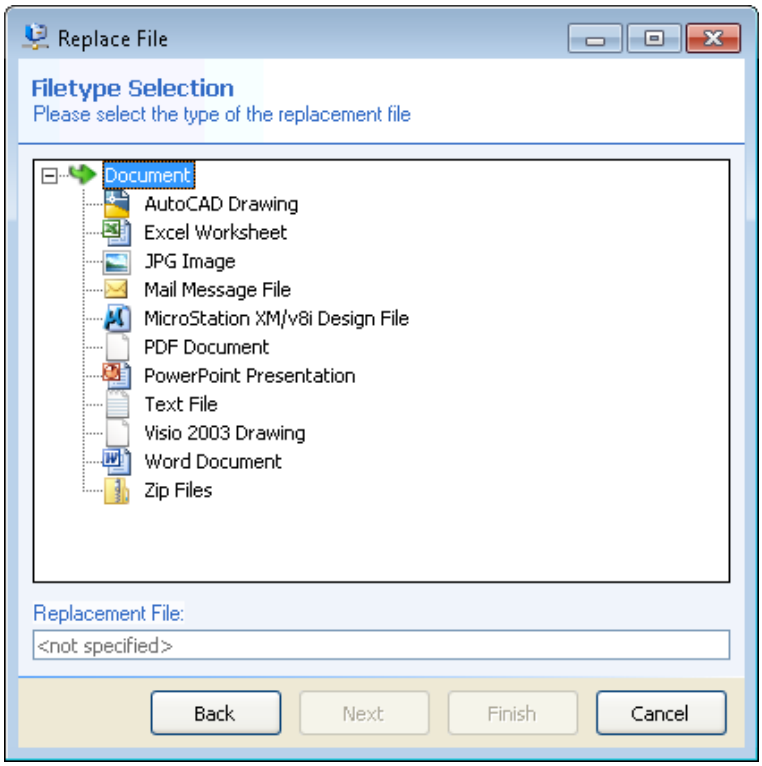


Figure 88

From the list of filetypes select the filetype you would like to use, to replace the existing file. Once you have decided which file is going to be replaced click it on, a Cabinet Replacement File window will be displayed (see below).

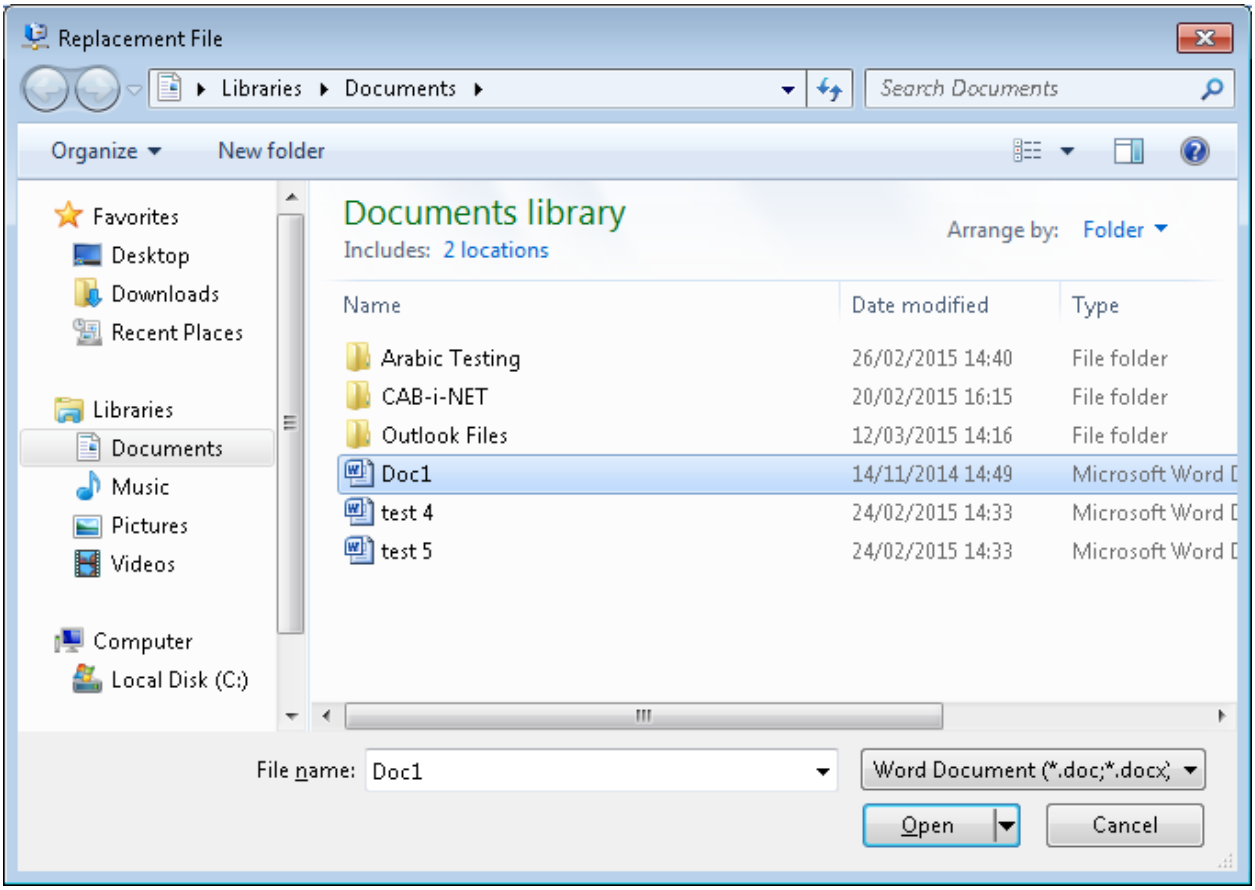


Figure 89

Once the filetype has been selected click on the Open button. The Replace File window will be displayed showing the Replacement File path (see below).

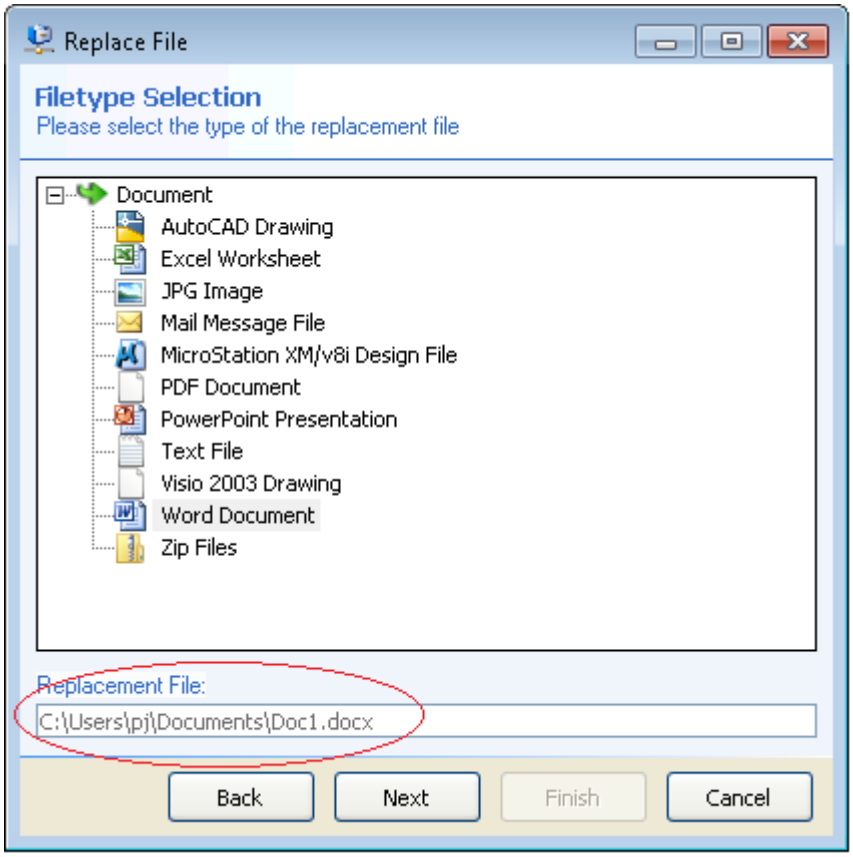


Figure 90

Click on the Next button and the Replace File - Confirmation window is displayed.

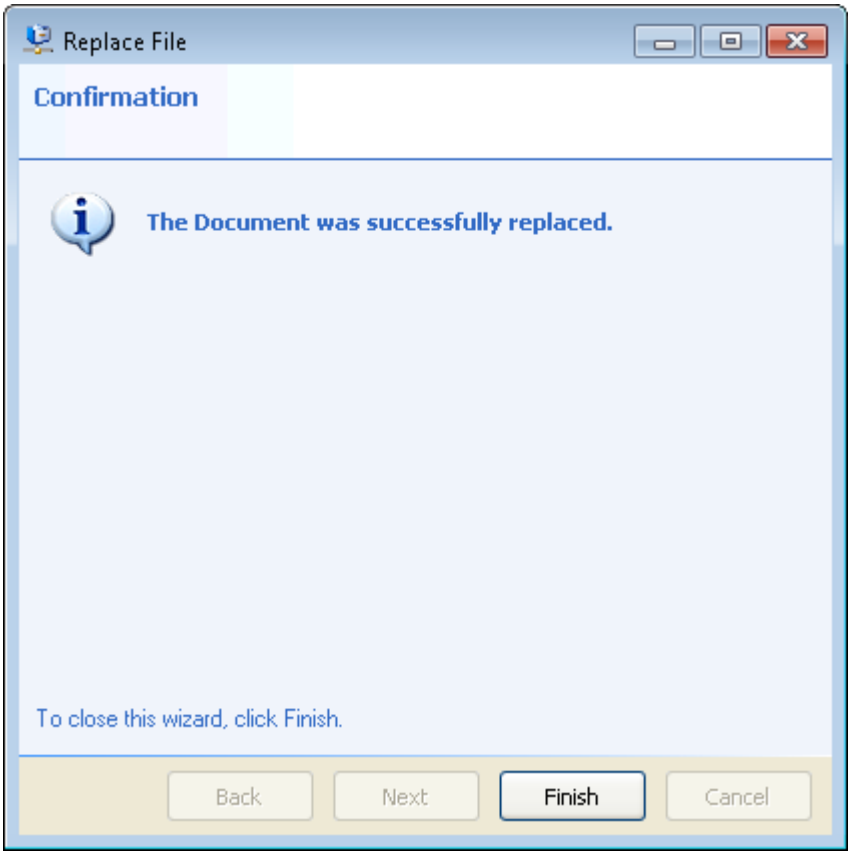


Figure 91

Next click on the Finish button, you will see that the file has now been changed to a different file type.

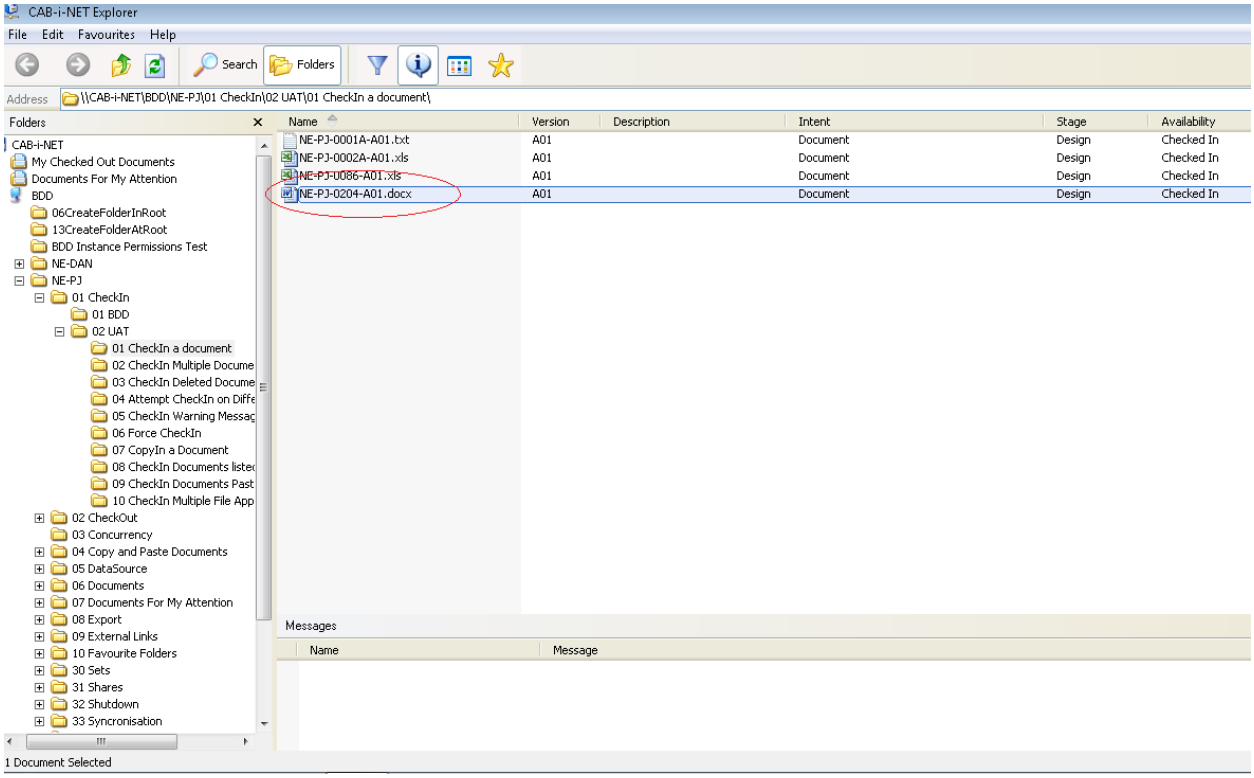

CAB-i-NET Explorer
File Edit Favourites Help
Search
Folders
Address
\\CAB-i-NET\BDD\NE-PJ\01 CheckIn\02 UAT\01 CheckIn a document\
Folders
CAB-i-NET
My Checked Out Documents
Documents For My Attention
BDD
06CreateFolderInRoot
13CreateFolderAtRoot
BDD Instance Permissions Test
NE-DAN
NE-PJ
01 CheckIn
01 BDD
02 UAT
01 CheckIn a document
02 CheckIn Multiple Docume
03 CheckIn Deleted Docume
04 Attempt CheckIn on Diffe
05 CheckIn Warning Messag
06 Force CheckIn
07 CopyIn a Document
08 CheckIn Documents listed
09 CheckIn Documents Past
10 CheckIn Multiple File App
02 CheckOut
03 Concurrency
04 Copy and Paste Documents
05 DataSource
06 Documents
07 Documents For My Attention
08 Export
09 External Links
10 Favourite Folders
30 Sets
31 Shares
32 Shutdown
33 Syncronisation
Name
Version
Description
Intent
Stage
Availability
NE-PJ-0001A-A01.txt A01 Document Design Checked In
NE-PJ-0002A-A01.xls A01 Document Design Checked In
NE-PJ-0086-A01.xls A01 Document Design Checked In
NE-PJ-0204-A01.docx A01 Document Design Checked In
Messages
Name
Message
1 Document Selected

Figure 92

Replace with a Previous Version

In this section it details how to replace an existing file with a previous version of that file, right-click on the file you wish to replace and the following window will be displayed.

From the options select '*Replace with a previous version*' (see below).

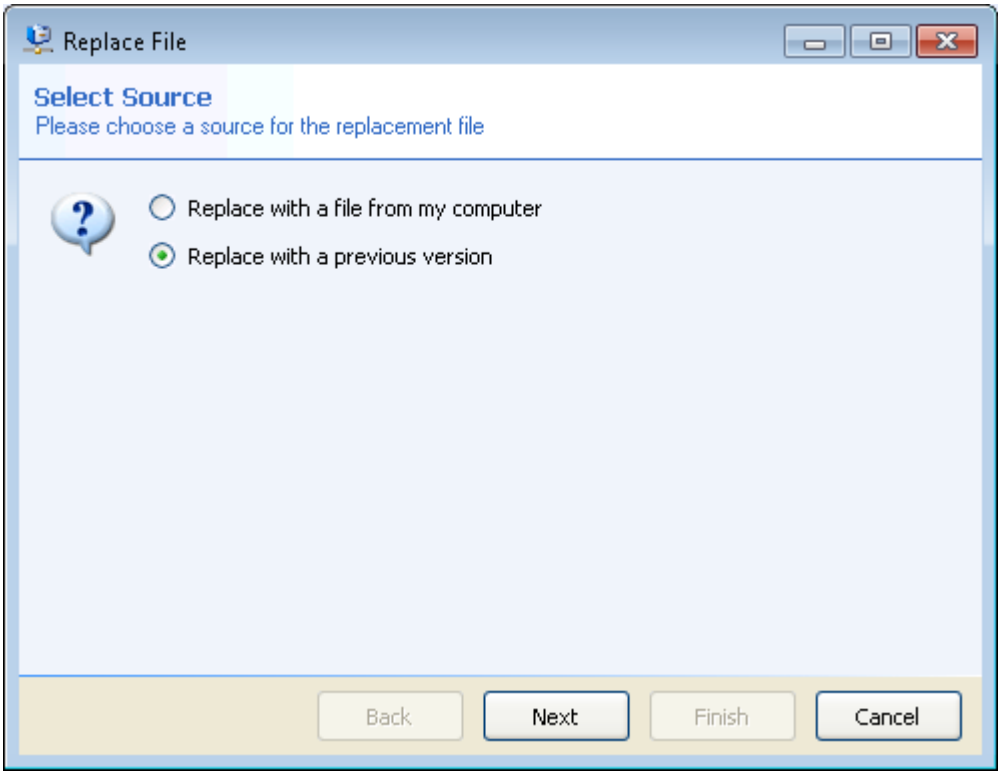


Figure 93

By clicking on the Next button the Replace File - Previous Versions window is displayed.

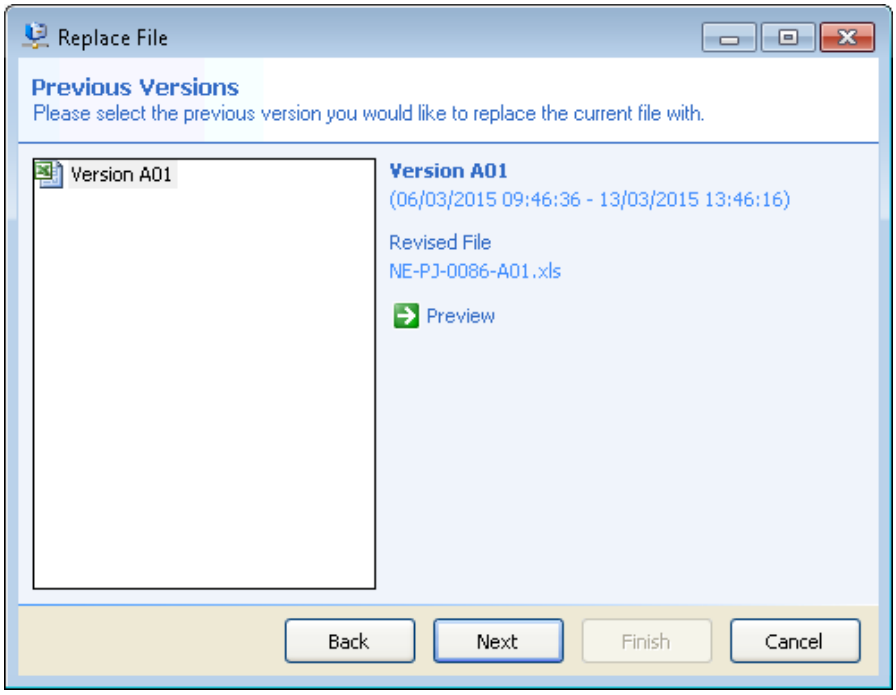


Figure 94

Click on the previous version and click the Preview option, the file will open automatically and display the content of it on screen, allowing you to preview the file before using the previous version.

If you click on the Next button the Replace File - Confirmation window is displayed advising you that the document has been replaced.

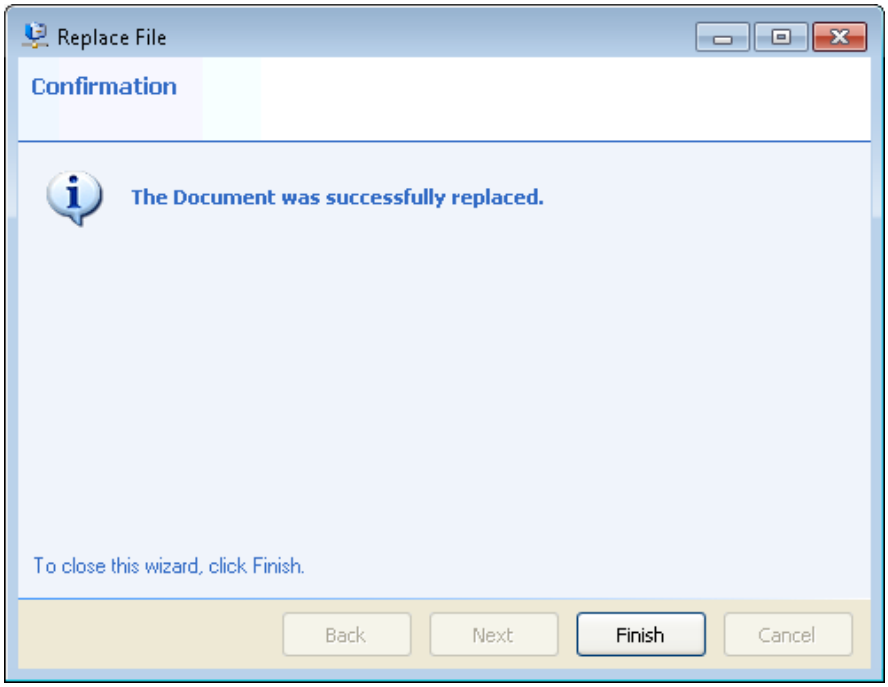


Figure 95

Click on the Finish button, if you now look at the properties of the file you have just replaced an entry will be shown in the Document History.

Searching for Documents

Cabinet Explorer allows many combinations of search criteria to be set up. This section gives some examples of various types of search. In each case, firstly click on the *Search* button and the Add Criteria button.

Filename

Select *Document Properties* > *Filename* and enter the name of the file to be found.

Click the *Run Search* button.

Keyword

Select *Keywords* and select the keyword from the submenus as shown. In this example, the *Scale* keyword is selected and the document keyword is selected from a list of values.

Figure 96

Workflow Stage

Select *Workflow* > *Stage* and click on *Enter Criteria* to display the list of workflows.

Click on the '+' button to display the stages as shown below.

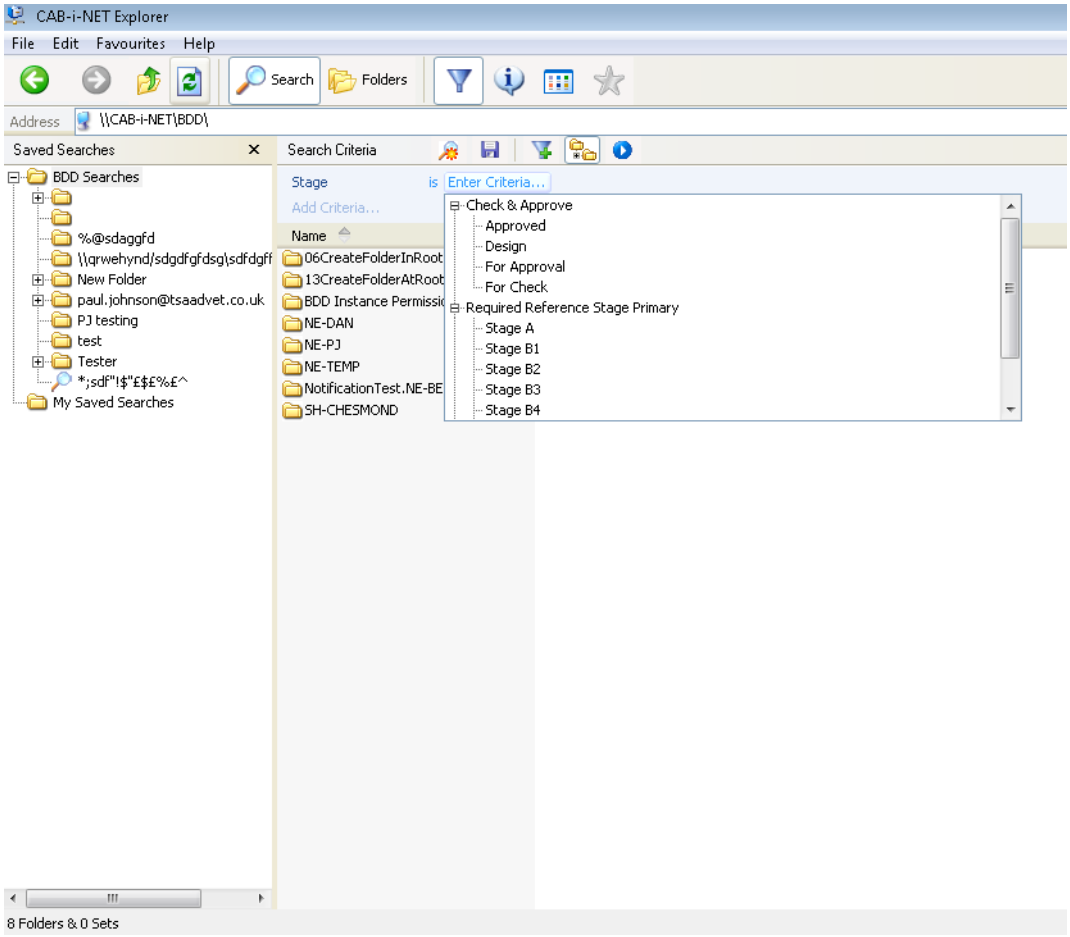


Figure 97

Select the required stage and click the *Run Search* button.

Note

If stages are re-used in more than one workflow, as shown, the search returns documents in all workflows that are at the selected stage.

Checking Out a Document

Click on the document name in the folders / files list, so that it is highlighted in blue.

Right-click and select *Check Out* from the menu. The message pane should report that the document was checked out successfully.

The document will now be listed in the *My Checked Out Documents* folder. If the document has references, a *Check Out References* prompt may be displayed.

Location Check Out

Select this option if the document is to be checked out to a chosen folder, on the user's PC for example.

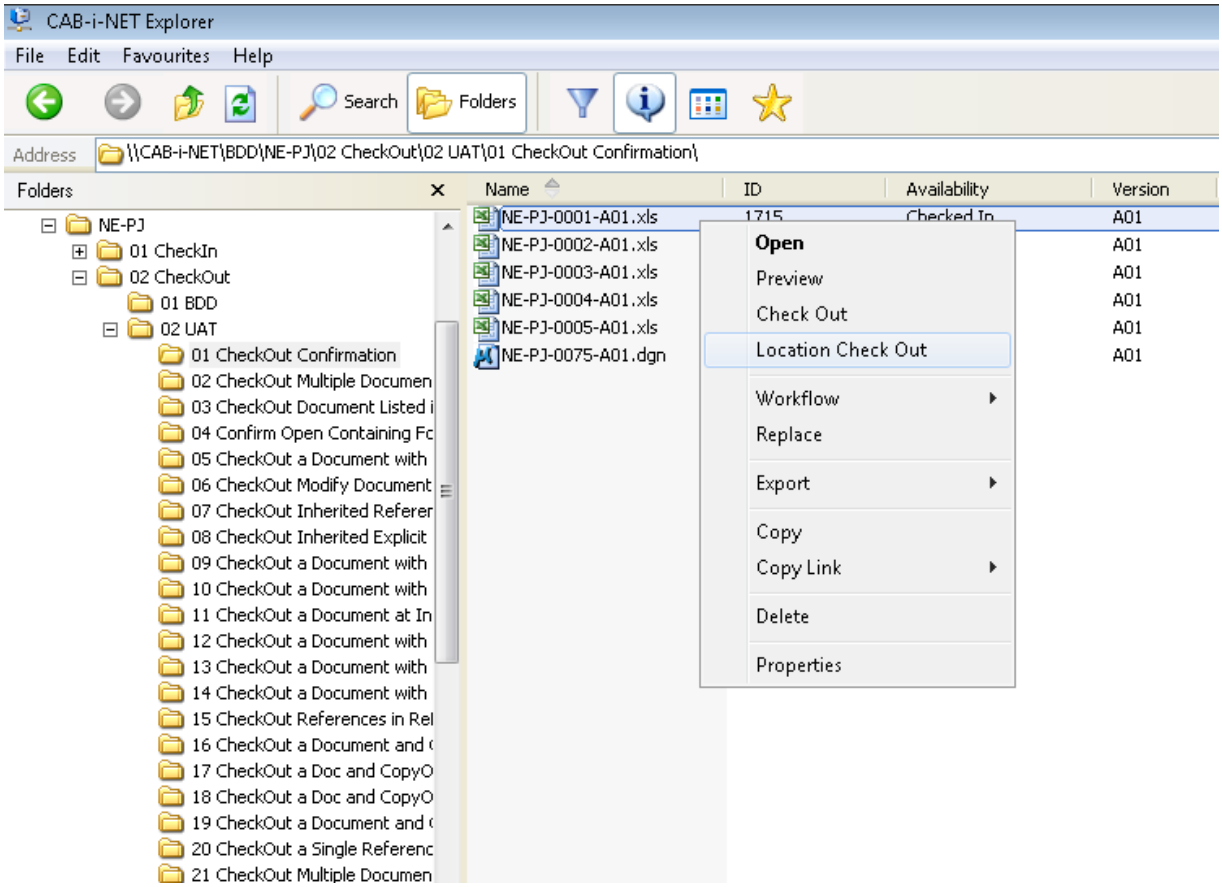


Figure 98

The Location Check Out folder is shown below:

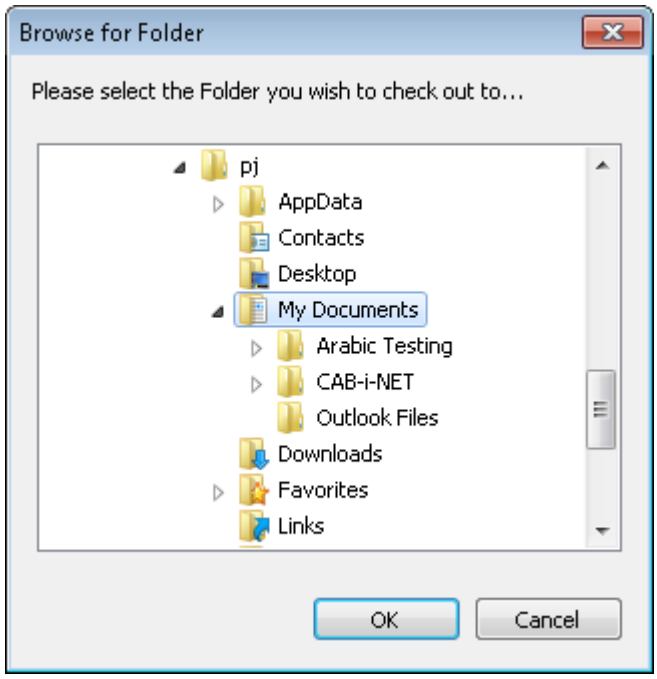


Figure 99

The Location Check Out message box is displayed (see below).

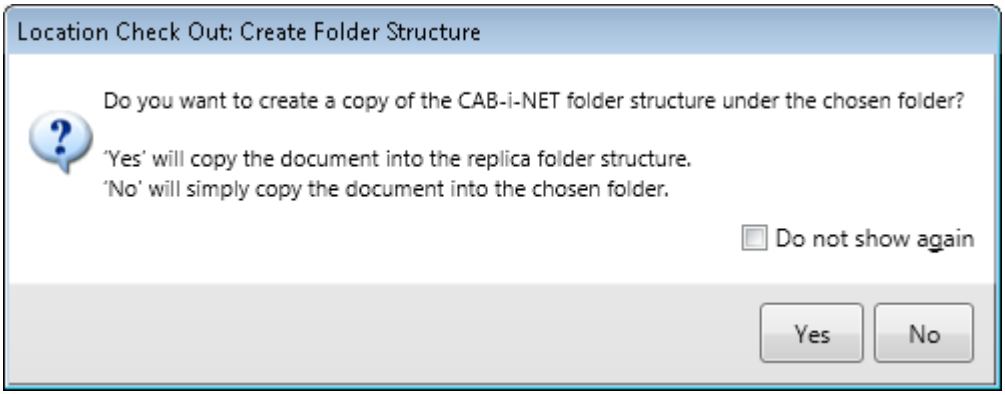

Location Check Out: Create Folder Structure
Do you want to create a copy of the CAB-i-NET folder structure under the chosen folder?
'Yes' will copy the document into the replica folder structure.
'No' will simply copy the document into the chosen folder.
Do not show again
Yes
No

Figure 100

- Select *Yes* if the folder structure of the selected documents should be copied to the *Check Out* folder, with the selected documents copied into the structure.
- Select *No* if the selected documents should be copied into the *Check Out* folder.

The message pane should report that the document was checked out successfully. If the document has references, a *Check Out References* prompt is displayed.

Checking In a Document

To Check In a Document follow the steps shown below:

- Click on the document name in the folders / files list, so that it is highlighted in blue.
- Right-click and select *Check In* from the menu.
- The message pane should report that the document was checked in successfully.

Location Check In

Select this option if the document is to be checked in from a chosen folder, on the user's PC for example.

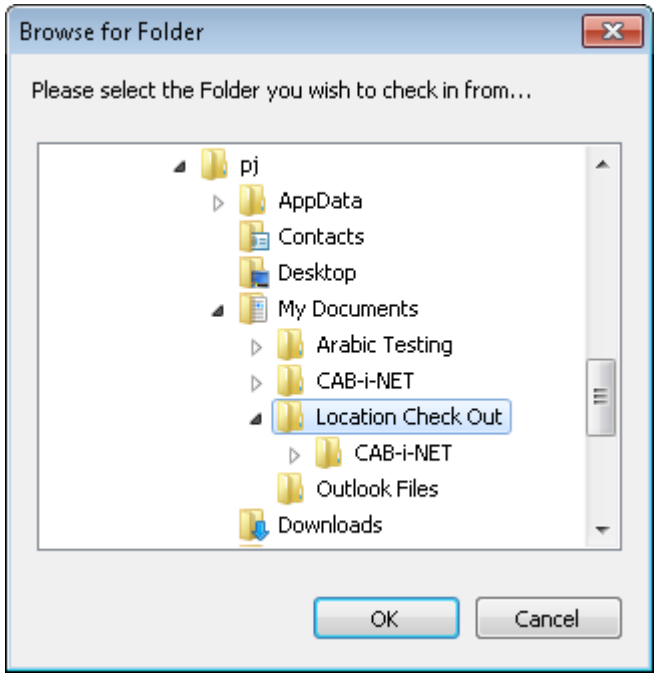


Figure 101

Browse to the required *Check In* folder and click *OK*.

The Navigation Folder message box:

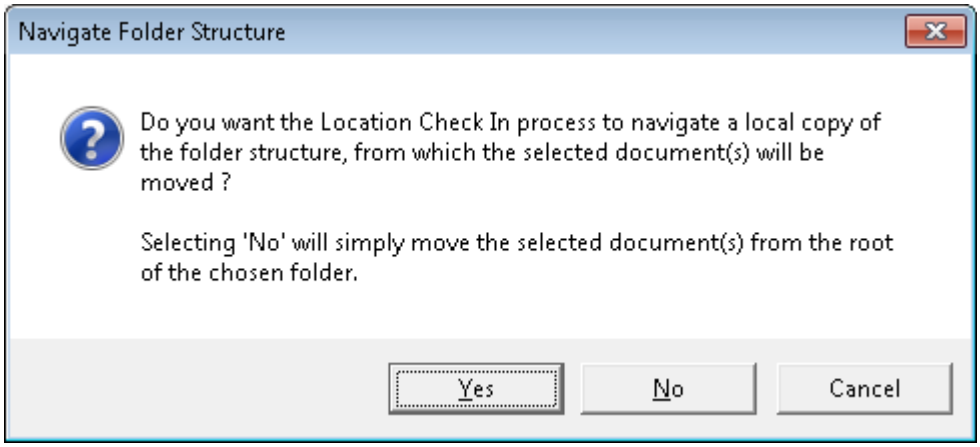

Navigate Folder Structure
Do you want the Location Check In process to navigate a local copy of the folder structure, from which the selected document(s) will be moved ?
Selecting 'No' will simply move the selected document(s) from the root of the chosen folder.
Yes
No
Cancel

Figure 102

- Select *Yes* to navigate a local copy of the folder structure to move the selected documents.
- Select *No* if the selected documents should be moved from the selected *Check In* folder.

The message pane should report that the document was Checked In successfully.

Copying In a Document

The *Copy In* option in the document right-click menu allows document updates to be copied in to the server while keeping the document checked out to the user. It is a convenient alternative to closing the document, checking it in, and reopening it.

Click on the document name in the folders / files list, so that it is highlighted in blue.

Right-click and select *Copy In* from the menu.

The message pane should report that the document was copied in successfully.

Getting a Working Copy of a Document

In some circumstances, depending on working practices including use of collaborative software such as Autodesk Revit, it may be preferable for users to be able to work with local copies of documents, stored in the user's *Check Out Path*, while leaving the documents checked in. The user's name is automatically appended to the local file names.

This option is available in the right-click menu according to the configuration of the workflow stage, which also determines whether document references (if applicable) are also copied out.

Select the document(s), right-click and select *Get Working Copy*, or select *Open Working Copy* to also open it.
Content goes here…

Viewing a document's properties

Click on the document's name in the folders / files list, right-click and select *Properties* from the menu.

Click on the options at the left of the form, as shown in the following table.

Document History	Click on the events list to view events that have taken place for this document.
Keywords	View the document keywords, if they have been created.
Notifications	Set up notifications to be sent by email on the selected date, for example as a reminder to review or delete the document.
Properties	View Document Properties: *Filename* *Reference* *Superseded* *Version* *Path* *Intent Path* *Filetype* *Numbering System* *IDL Group* *Availability* *Created By* *Last Edited By*
References	View a document's references and documents that reference it.
Workflow History	View the workflow name, its current stage and the Stage Date, i.e. the date that the workflow changed to the current stage.

Setting Notifications

Cabinet Explorer can notify users by email at a selected date to review or delete a document, for example. Notification events can be set up for individual or multiple documents. Note that there can be more than one notification event per document, as shown. Historical events are shown greyed-out.

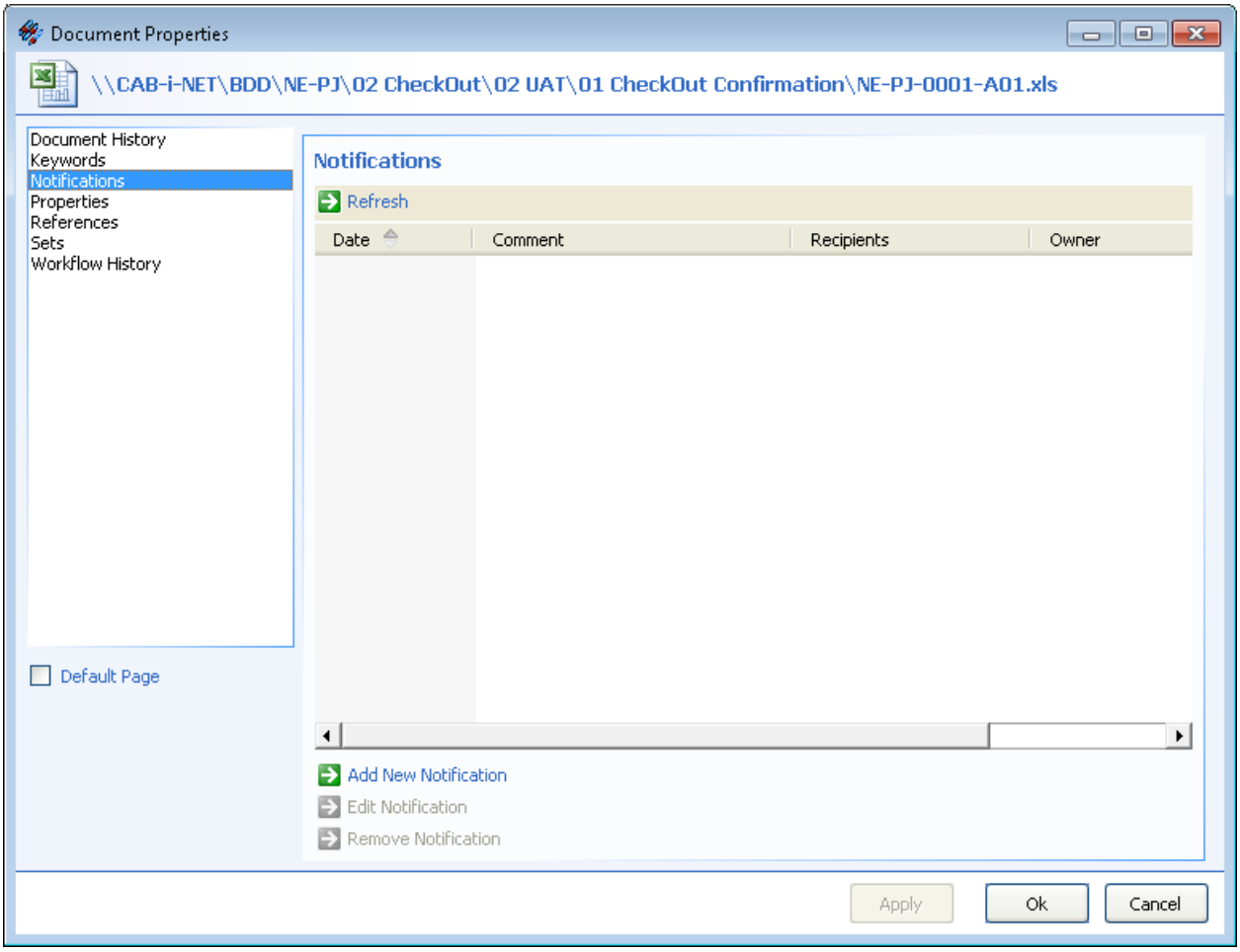


Figure 103

Adding a New Notification

In Document Properties, select Notifications in the list then:

- Click Add New Notification.

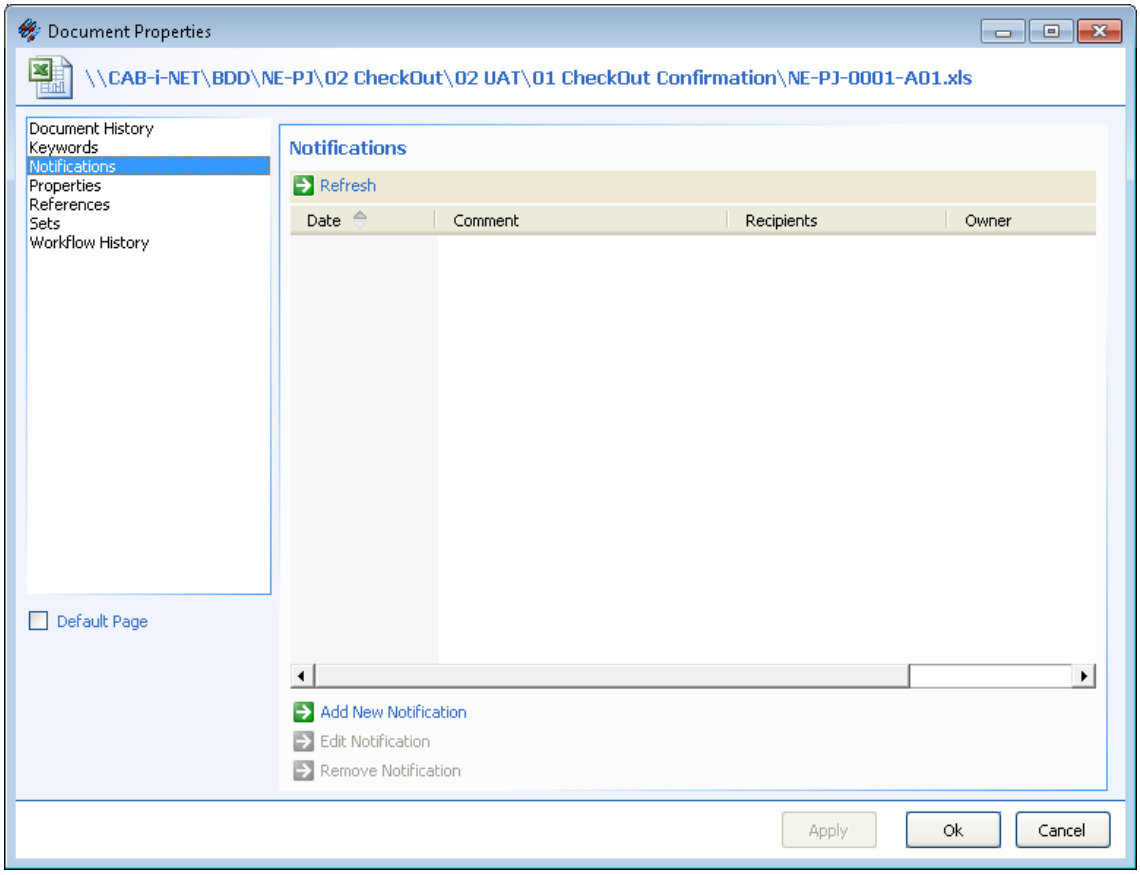


Figure 104

Once the Add New Notification has been clicked on then the following screen will be displayed.

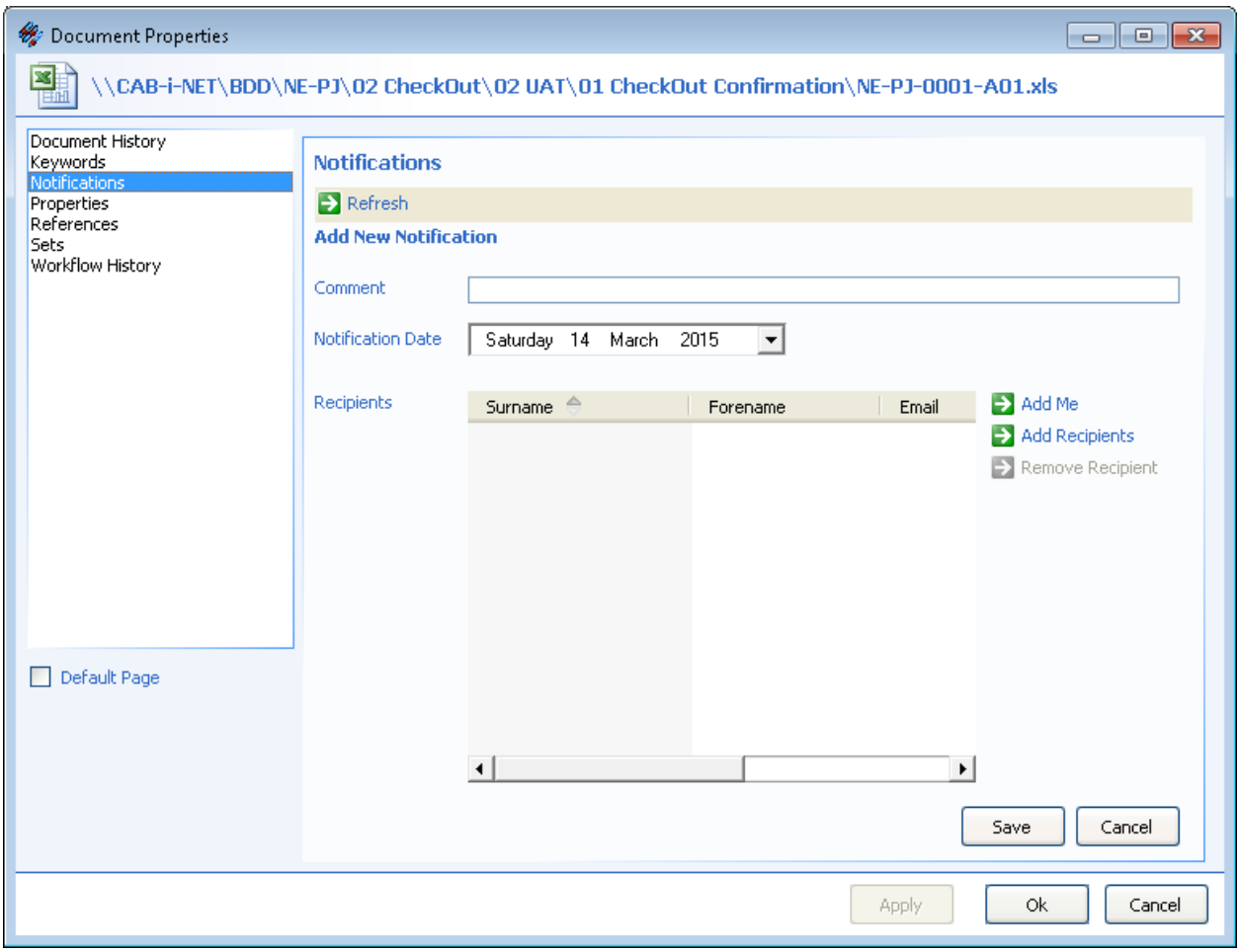


Figure 105

- Enter a description for this notification.
- Click the *Notification Date* arrow and select the required date.
- Click *Add Recipient* and select the users to receive the notification.
- Then click on the *Ok* button.

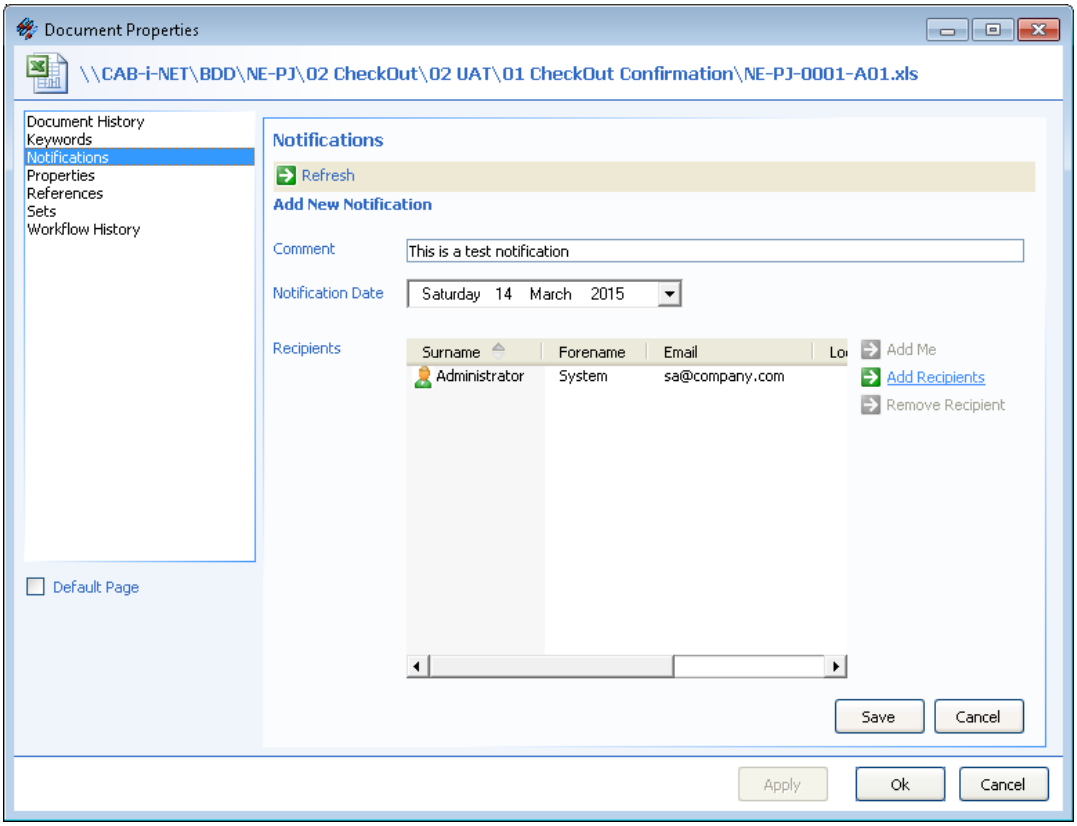


Figure 106

Click *Save* to create the notification. The notification is listed as shown on the next page.

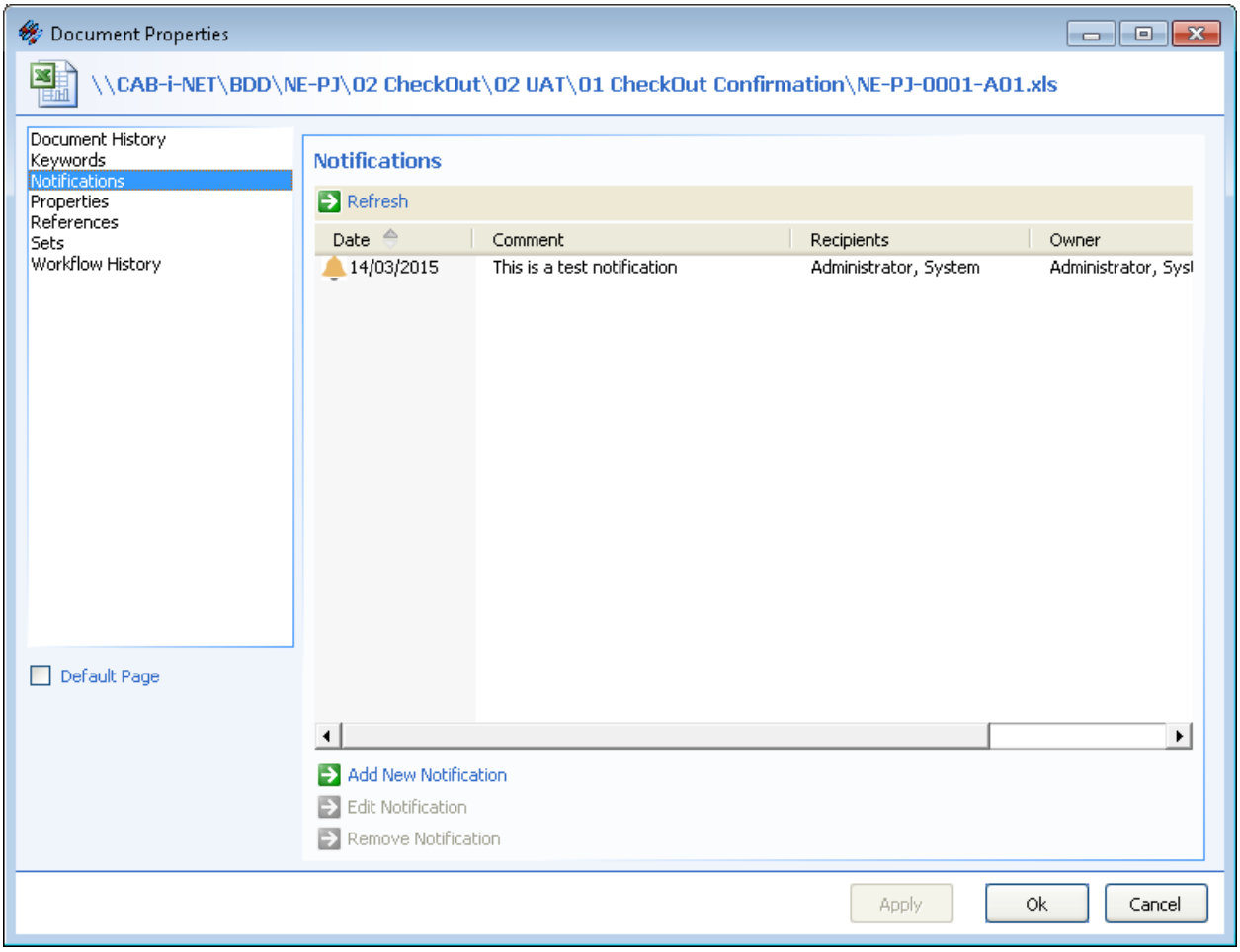

Document Properties
\\CAB-i-NET\BDD\NE-PJ\02 CheckOut\02 UAT\01 CheckOut Confirmation\NE-PJ-0001-A01.xls
Document History
Keywords
Notifications
Properties
References
Sets
Workflow History
Default Page
Notifications
Refresh
Date
Comment
Recipients
Owner
14/03/2015
This is a test notification
Administrator, System
Administrator, Sysl
Add New Notification
Edit Notification
Remove Notification
Apply
Ok
Cancel

Figure 107

Removing a Recipient

Select the recipient and click *Remove Recipient.*

Removing a Notification

Select the notification and click *Remove Notification*.

Adding a Notifications for Multiple Documents

Select the required documents, right-click and select *Notifications.*

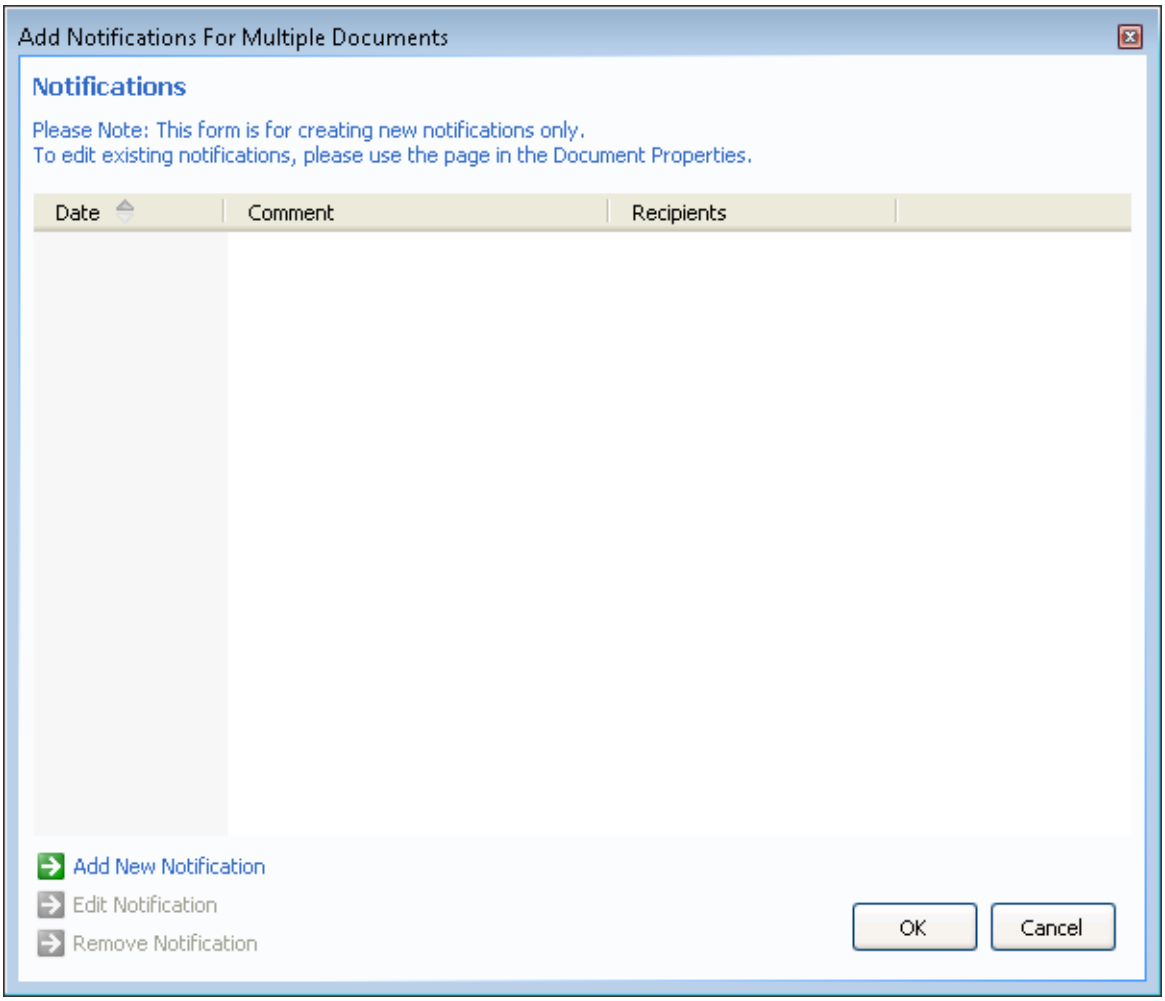


Figure 108

Click *Add New Notification* and select users as described above. Note that this form is not intended to show existing notifications for the selected documents.

Viewing, Reinstating or Exporting a Document Version

Click on the document's name in the folders / files list, right-click and select *Properties* from the menu.

Click on *Document History* at the left of the form.

Click on the required document version in the *Chronological Events* list.

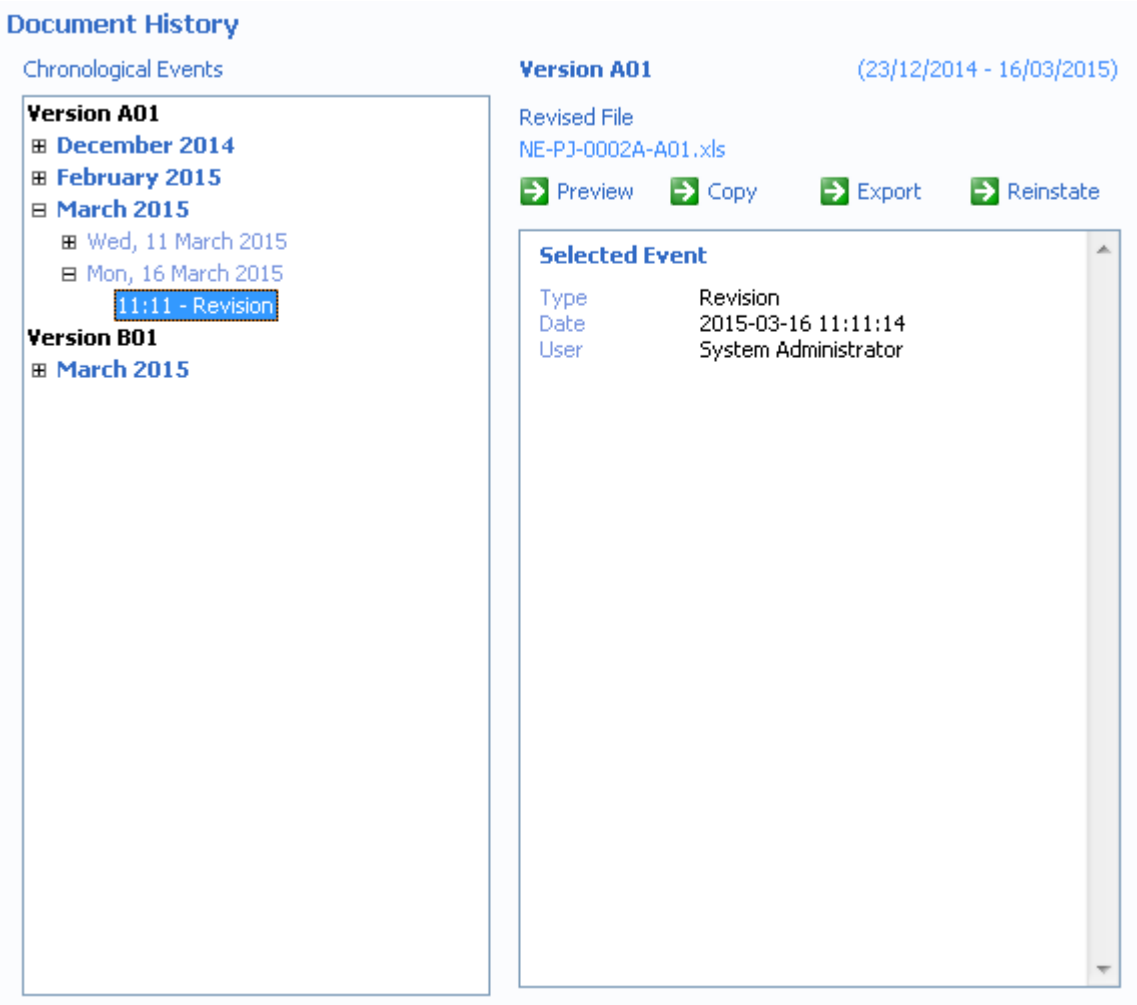


Figure 109

Depending on user privileges, the following options are available, near the top-right corner of the form:

Preview	View the selected version of the document (ready only).
Copy	Copy the selected version of the document so that it can be either pasted as a new document or 'Paste as Reference' into another document.
Export	Export the selected version of the document. When prompted, browse to the destination folder and click *OK*.
Reinstate	Reinstate the selected version of the document as the current version.

Exporting the Previous Version of Multiple Documents

To perform this action:

- The user must have the required privilege for this operation.
- All of the selected documents must have a previous version.

Select the document or documents to be exported, right-click and select

- Export > Previous Version > to Folder.

Or

- Export > Previous Version > to Mail Recipient.

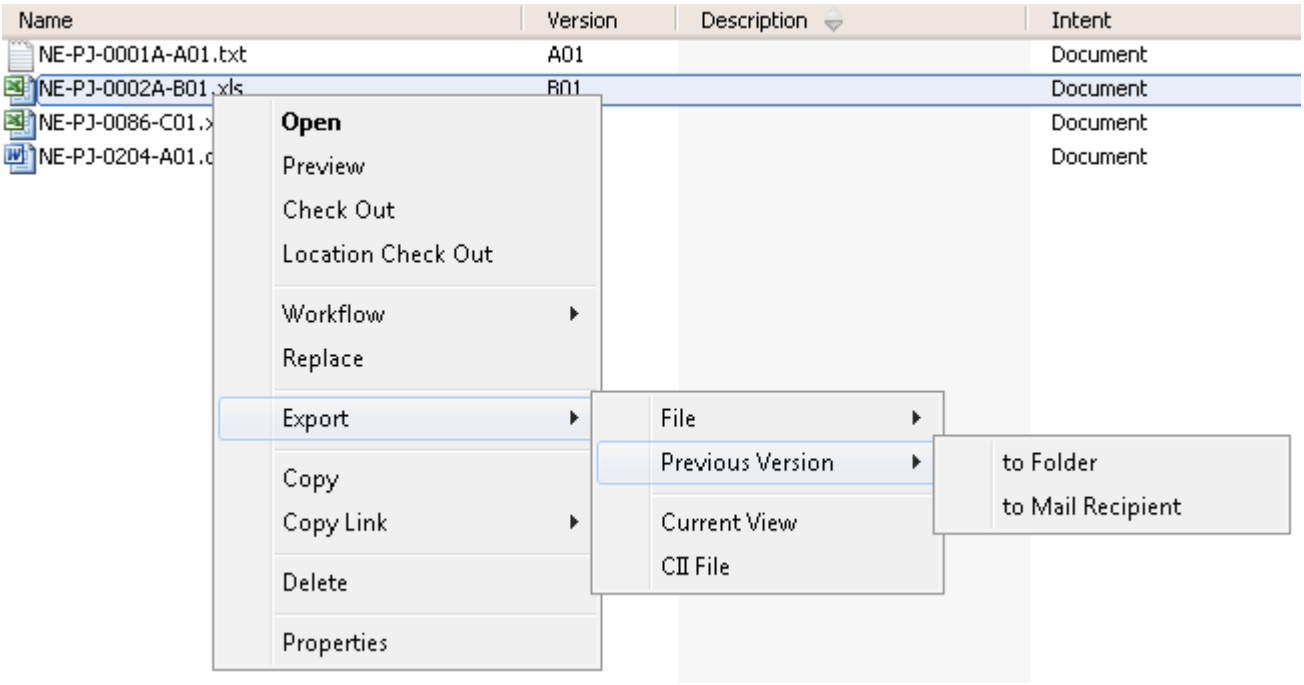
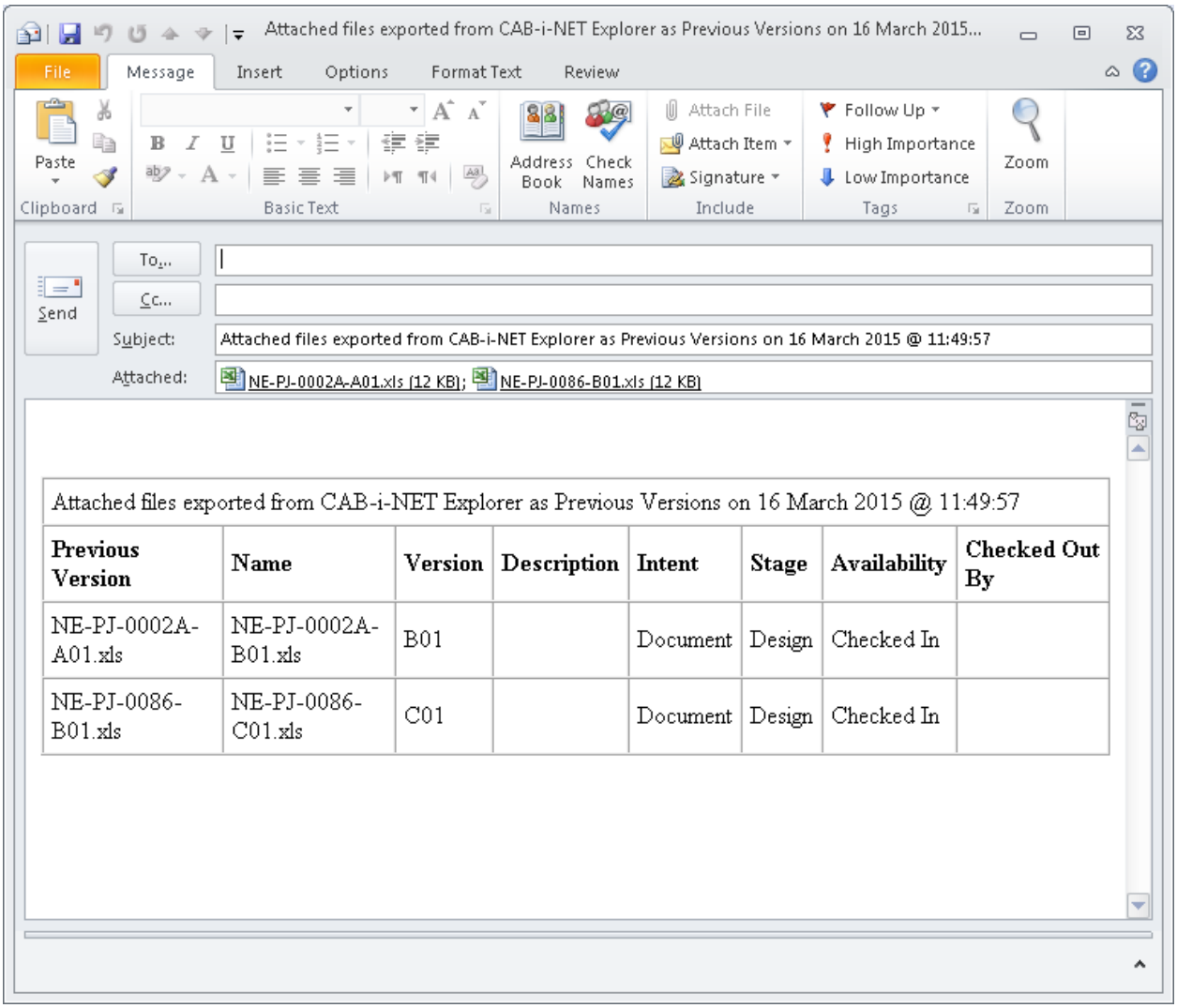


Figure 110

If exporting to a folder, browse to the destination folder and click *OK*.

If exporting to a mail recipient, an email is created with the selected documents attached and listed in the email body, as shown below.



Attached files exported from CAB-i-NET Explorer as Previous Versions on 16 March 2015 @ 11:49:57

Previous Version	Name	Version	Description	Intent	Stage	Availability	Checked Out By
NE-PJ-0002A-A01.xls	NE-PJ-0002A-B01.xls	B01		Document	Design	Checked In	
NE-PJ-0086-B01.xls	NE-PJ-0086-C01.xls	C01		Document	Design	Checked In	

Figure 111

The email lists the previous version document numbers, together with the other columns of information currently displayed in the document list.

The document history displays Export Revised Version Details: *Exported to Mail Recipient*. Note that when exporting to mail recipients, it is a record that the email was created, not that it was sent.

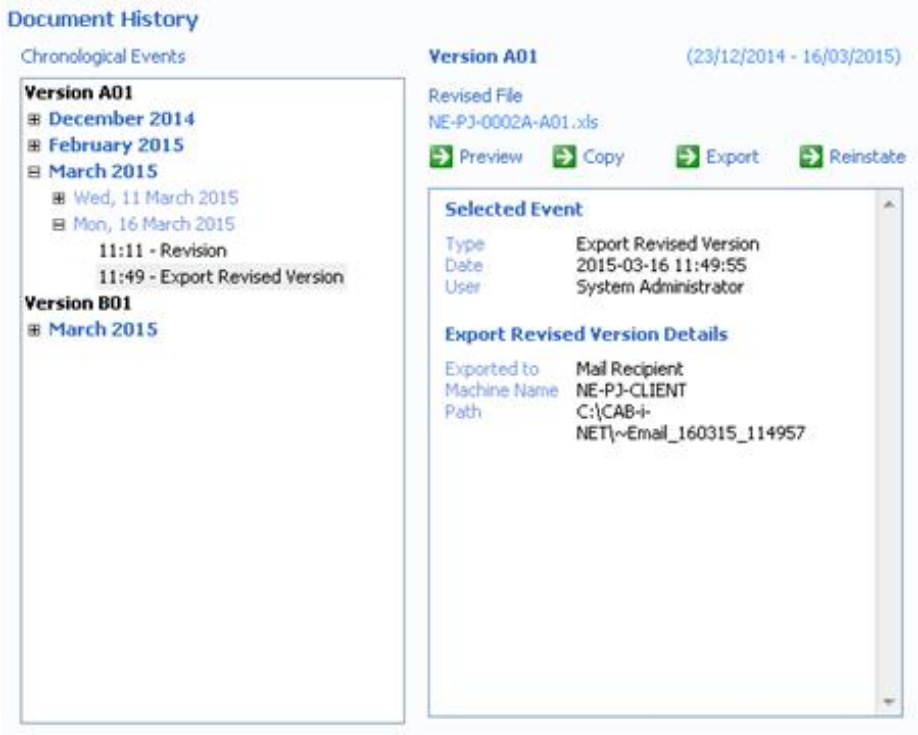


Figure 112

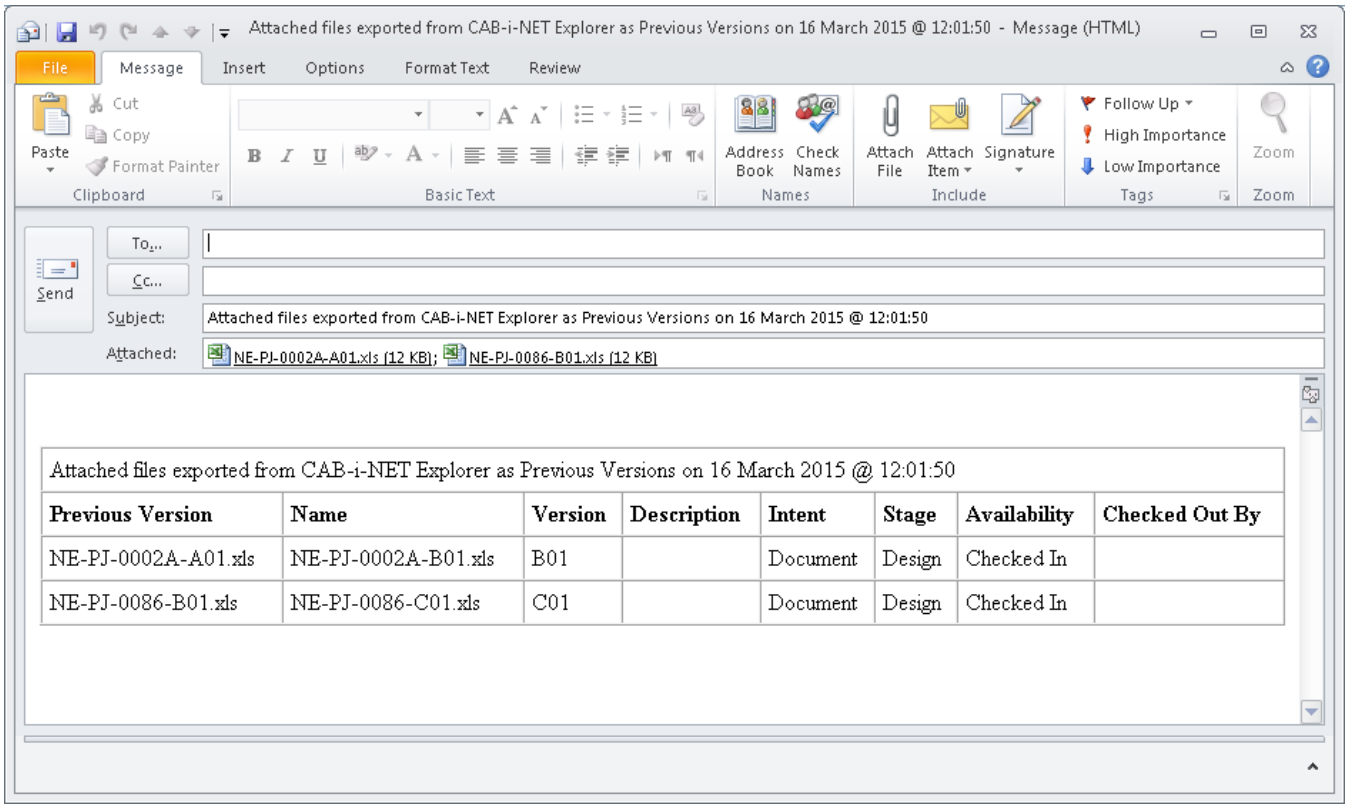
Export of an earlier version can be performed on individual documents.

Exporting Files

Select the documents to be exported, right-click and select *Export > File > to Folder* or *Export > File > to Mail Recipient.*

If exporting to a folder, browse to the folder location and click OK.

If exporting to a mail recipient, an email is created with the selected documents attached and listed in the email body, as shown on the next page.



Attached files exported from CAB-i-NET Explorer as Previous Versions on 16 March 2015 @ 12:01:50

Previous Version	Name	Version	Description	Intent	Stage	Availability	Checked Out By
NE-PJ-0002A-A01.xls	NE-PJ-0002A-B01.xls	B01		Document	Design	Checked In	
NE-PJ-0086-B01.xls	NE-PJ-0086-C01.xls	C01		Document	Design	Checked In	

Figure 113

The document history displays Export Details: *Exported to Mail Recipient*.

Exporting Published Files

Select the documents to be exported, right-click and select *Export > Published File > to Folder* or *Export > Published File >* to Mail Recipient.

If exporting to a folder, browse to the folder location and click OK.

If exporting to a mail recipient, an email is created with the selected documents attached and listed in the email body.

Exporting the Current View

The current view of documents selected in the document list (with the selected columns) can be exported in HTML, XML or TXT files. HTML and XML files (depending on configuration) can be viewed in tabular form when opened in a browser.

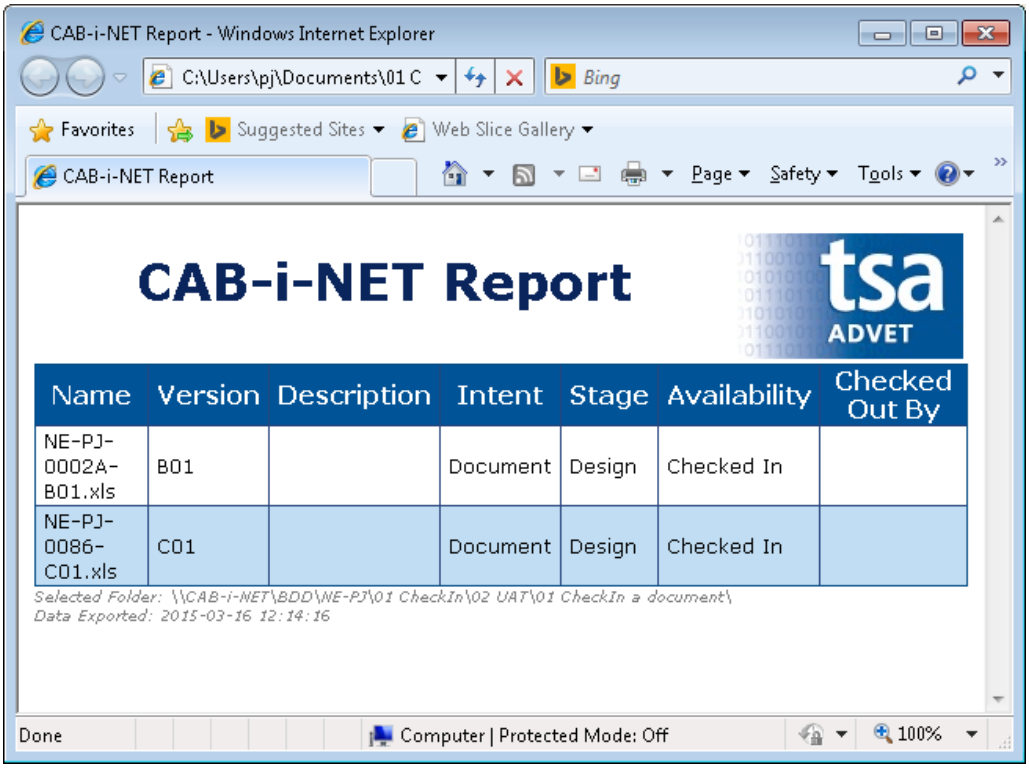


Figure 114

Select the documents to be exported, right-click and select *Export > Current View.* Select the required name, location and file type (HTML, XML or TXT) and save the file.

The report format is configurable by folder, folder type, Instance or Context.

Editing Document Keywords

Depending on the workflow stage of the selected document and the user's privileges, keyword editing may be disabled. In this case, a padlock symbol is displayed in the *Document Keywords* screen.

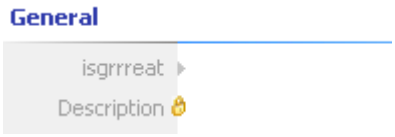


Figure 115

Single Document

Click on the document's name in the folders / files list, right-click and select *Properties* from the menu.

Click on the *Keywords* option at the left of the form.

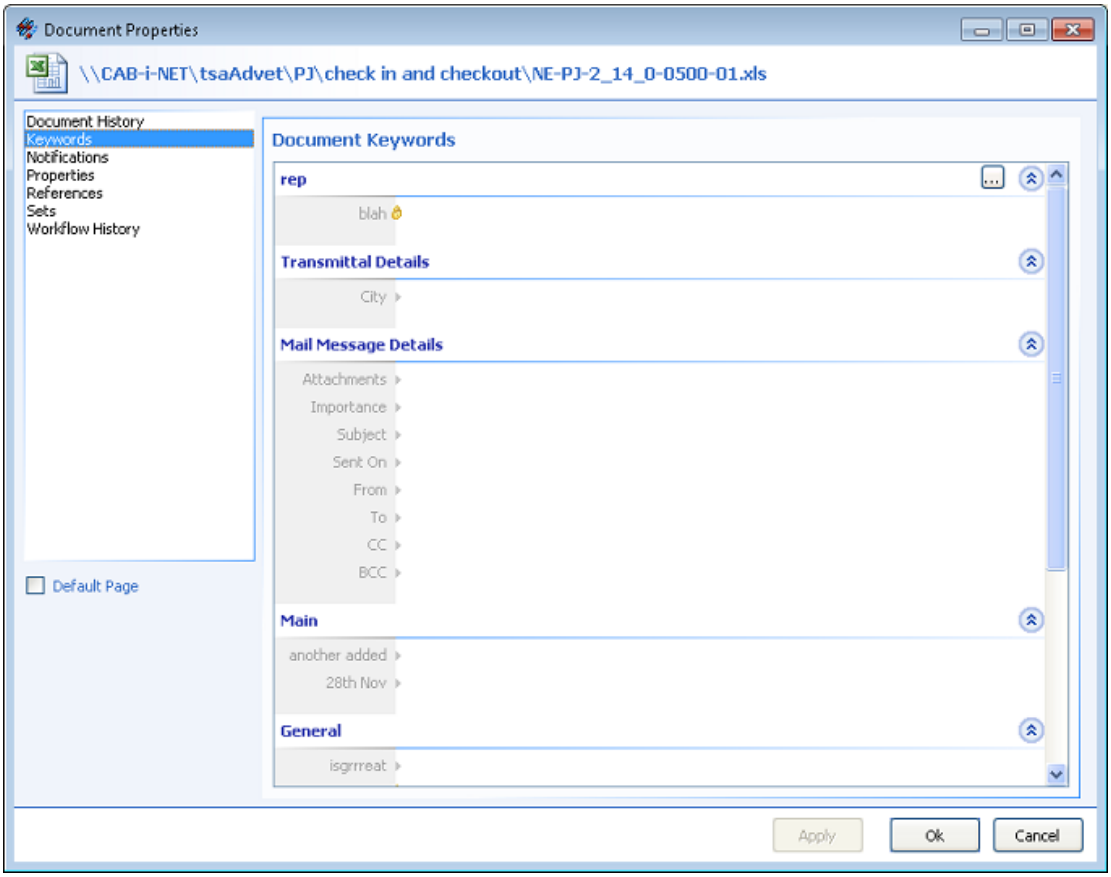


Figure 116

Keywords may be single value (freetype or preset values), multi-value or date format. Click on the keyword value to edit it.

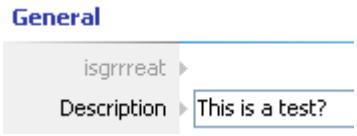
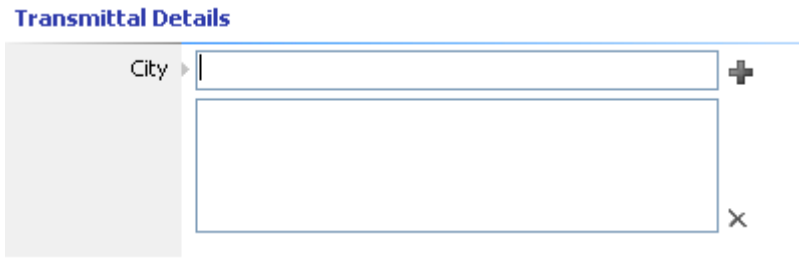
Single value, freetype	Type in the text box.	
Multi-value	To add a value, type in the text box and click '+' to add it to the list. To delete a value, select it in the list and click the 'X' button.	

Figure 117.

Multiple Documents

Editing of keywords for multiple documents is only available to users with privileges.

Select the documents in the folders / files list, right-click and select *Properties* from the menu. Note that existing keyword values are not shown when multiple documents are selected.

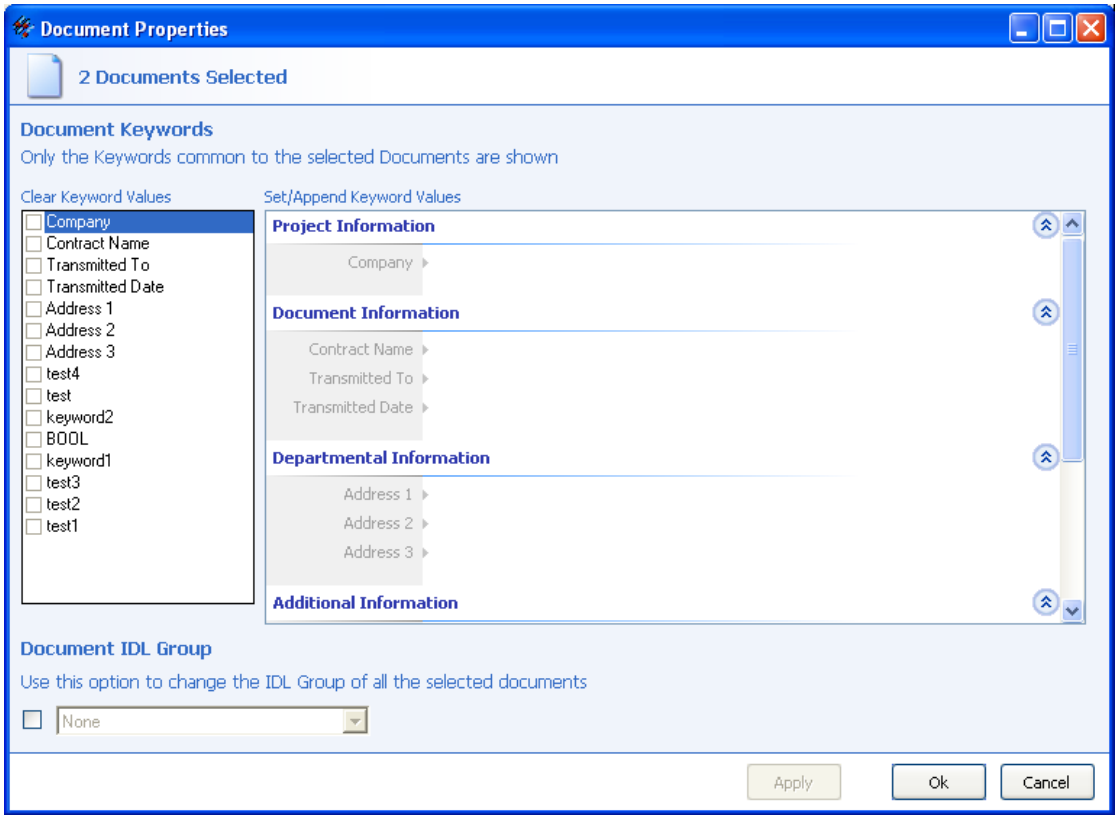


Figure 118

If a *Clear Keyword Values* checkbox is ticked, the selected keyword is cleared from all of the selected documents.

Keyword entries (see *Single Document* above) are applied to all of the selected documents.

For multi-value keywords, new keyword entries are appended to the existing values.

Image File Keywords

Note that the keywords of image files (JPG etc) can be populated automatically from EXIF data in the files, where applicable, by the Cabinet Thumbnail service. The keywords become populated after the files are created or imported in Cabinet Explorer.

The Cabinet Administrator utility is used to associate EXIF tag names with Cabinet Explorer keywords.

Editing the IDL Group of Multiple Documents

Select the relevant documents, right-click and select *Properties.*

Tick the checkbox in the *Document IDL Group* section of the form to enable selection from the IDL Group drop-down list.

Select the required IDL Group for the selected documents.

Click *Apply* or *OK* to save the changes.

Viewing 'My Checked Out Documents'

Click on *My Checked Out Documents* in the folder tree.

Click on a document and right-click to display the menu.

Open	Open the document for editing.
Preview	View the document (read-only).
Check In	Note that a document cannot be checked in if it was checked out on a different machine. Also note that if a document is checked in, it no longer appears in *My Checked Out Documents.*
Copy In	Save document updates to the server while keeping the document checked out.
Force Check In	All changes made to the document will be permanently discarded-confirmation is required.
Export	File Published file Previous Version Current View CII file
Copy	Copy the document.
Copy Link	To Clipboard To Mail Recipient
Open Containing Folder	Open a new Cabinet Explorer window, showing the files in the folder that holds this document.
Properties	View the document properties.

Viewing ‘Documents for My Attention’

When a user makes a change to a document’s workflow stage, it can mean that the document now requires an action to be carried out by another user. That user will then see the document, and any other similar documents, listed in their *Documents For My Attention* folder.

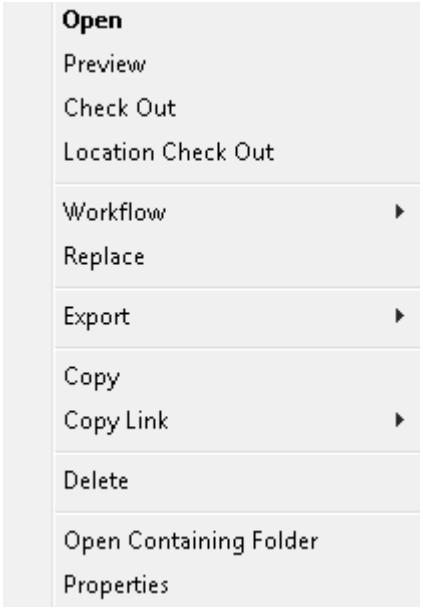


Figure 119

See the next page for the function behind the menu options.

Click on a document in the *Documents for my Attention* folder and right-click to display the menu.

Open	Open the document as a read-only file.	
Preview	Open the document as a read-only file.	
Check Out	Take the document to another workflow stage	
Location Check Out	Allows you to location check out a document anywhere you wish	
Workflow	Review and Reset to 'stage 1' Override	Stage 2 to 3…
Replace	Allows the user to replace an existing file with another file type	
Export	File Current View CII File	To Folder To Mail Recipient
Copy		
Copy Link	To Clipboard To Mail Recipient	
Delete	Delete the file – confirmation is required.	
Open Containing Folder	Open a new Cabinet Explorer window, showing the files in the folder that holds this document.	
Properties	View the document properties.	

Sets

This section guides you through the various features that the Sets functionality brings to Cabinet Explorer.

The Set Functionality

In the table shown below are the options available within the Sets functionality.

Open	Open the Set to view its contents.
Explore	Open a new Cabinet Explorer window with the Folders but-ton enabled.
Add to Favourites	Add the selected Set to the Favourites list, for rapid navigation.
Cut	Set right-click menu items available.
Add to Set	This allows you to add files to the Set.
Copy	Set right-click menu items available.
Copy Link	Copy a link to the Set to the clipboard, or create an email with the link included.
Delete	Delete the selected Set - confirmation is required.
Properties	Display the Set Properties form.

Creating a Set

Navigate to the folder to where you wish to create the set, then right click anywhere in the listview and select 'New --> Set' (see below for screen shot).

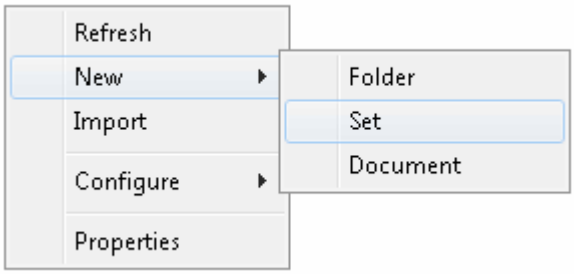


Figure 120

Once you have selected the menu item *Set*. The following screen will be displayed; you will be required to enter the Name and Description of the Set you are creating.

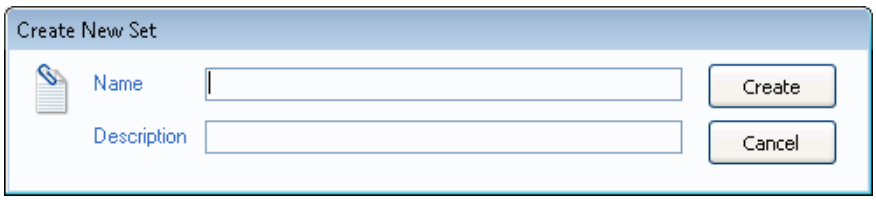
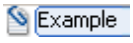


Figure 121

Once you have created the *Set* the following icon will be displayed in the listview 

.

Open a Set

To open a *Set* double click or right-click on the *Set* you wish to open and select the Open option, once you have opened the *Set* the contents of the Set is displayed.

Adding Document(s) into a Set

This section shows you how to Copy a document or documents into a Set.

Navigate to the documents you wish to copy, right-click on the documents and select the copy option from the menu items.

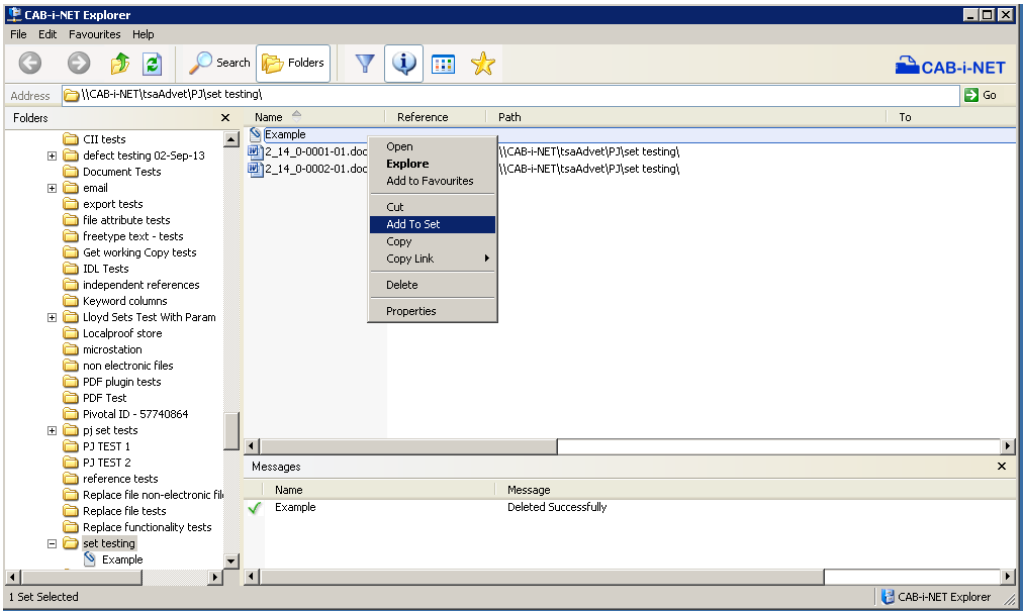


Figure 122

To add document(s) to a set you will have had to of copied the documents. This section will show you how to add document(s) into a Set, if you right click on the set you have created and select the Add to Set option from the menu items (see below).

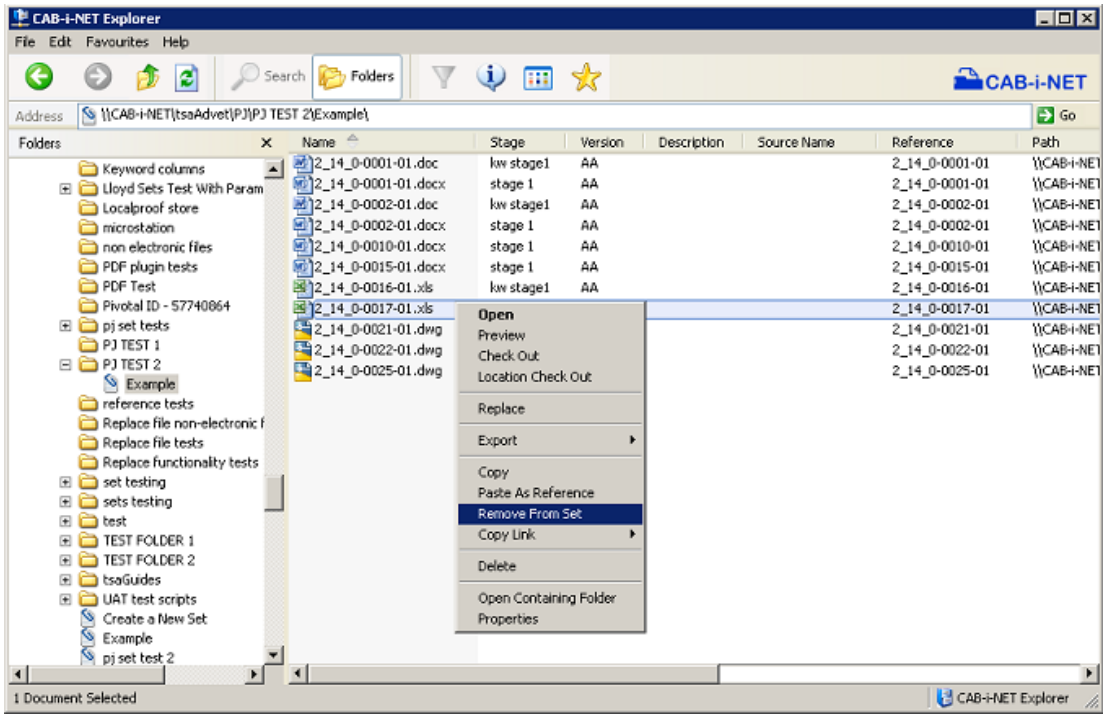


Figure 123

Remove a Document(s) From a Set

To remove a file from a Set, right click on the file you want to remove and select the option Remove From Set.

Once this option has been selected the file selected will be removed from the Set.

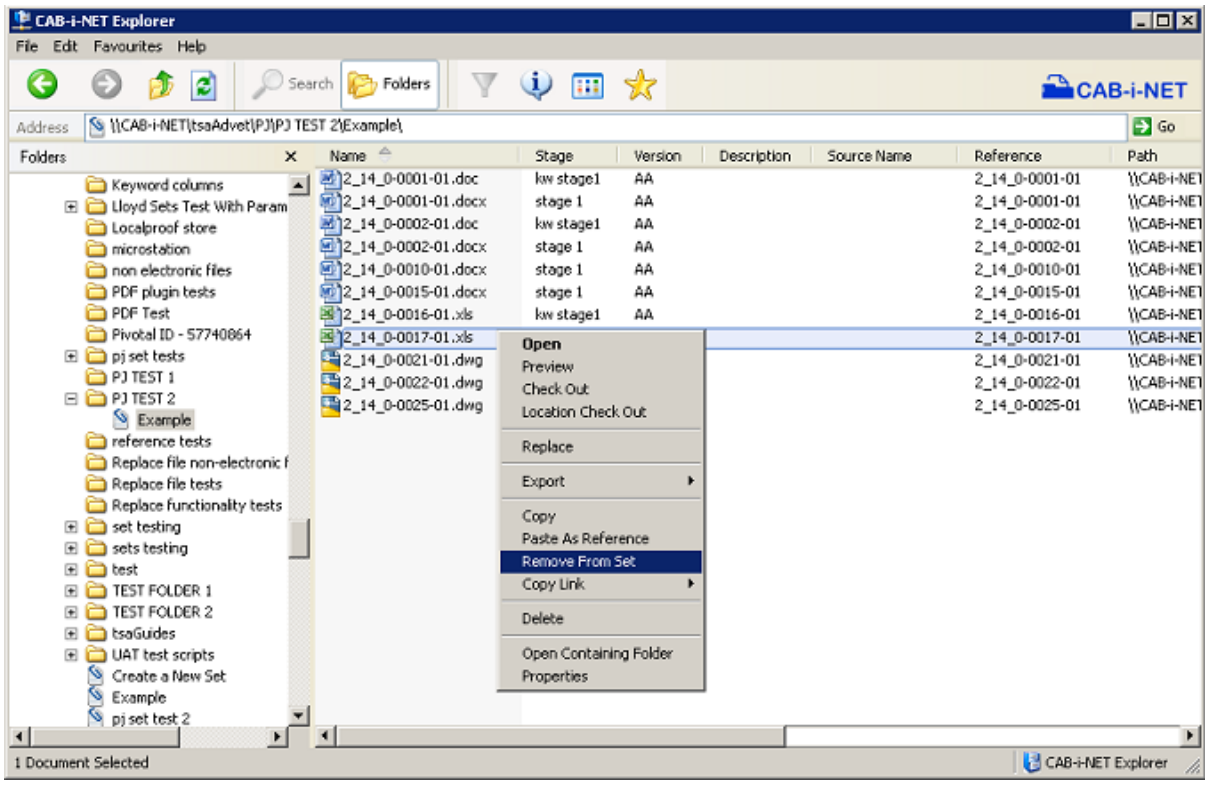


Figure 124

Once this option has been selected the file selected will be removed from the Set.

Cutting and Pasting a Set

This section briefly outlines the process to cut a set and move/paste to another folder within Cabinet Explorer. The Set will be removed from the listview.

NB: This is only an option when logged into Cabinet Explorer as a System Administrator.

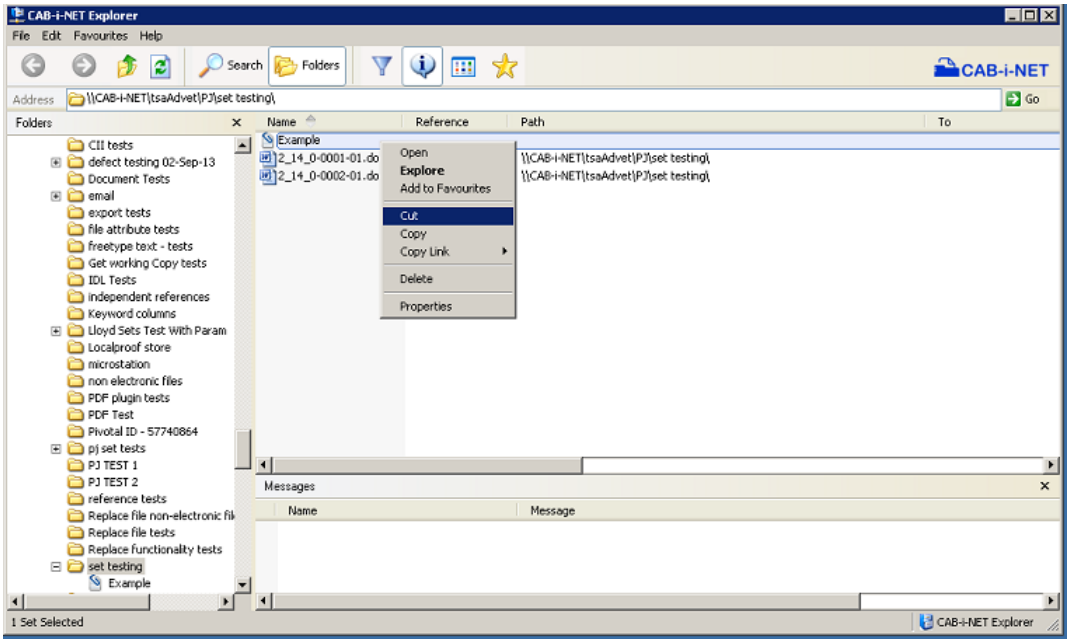


Figure 124.

Once you have selected the Cut option, you can then navigate to anywhere you wish and paste the Set.

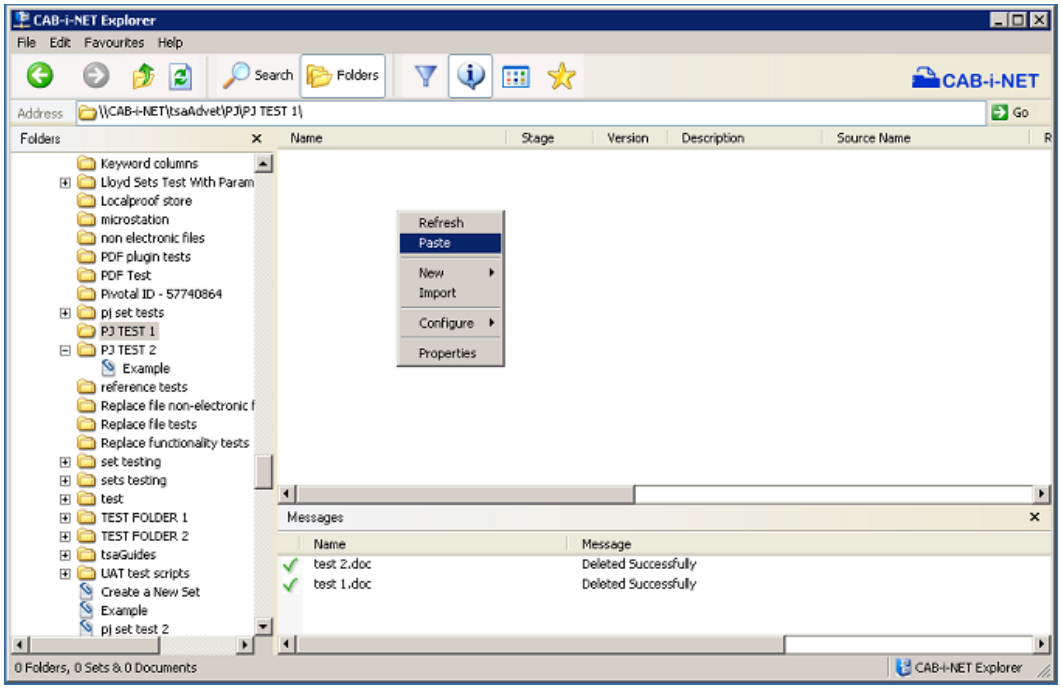


Figure 125

The Set has been successfully pasted into another folder.

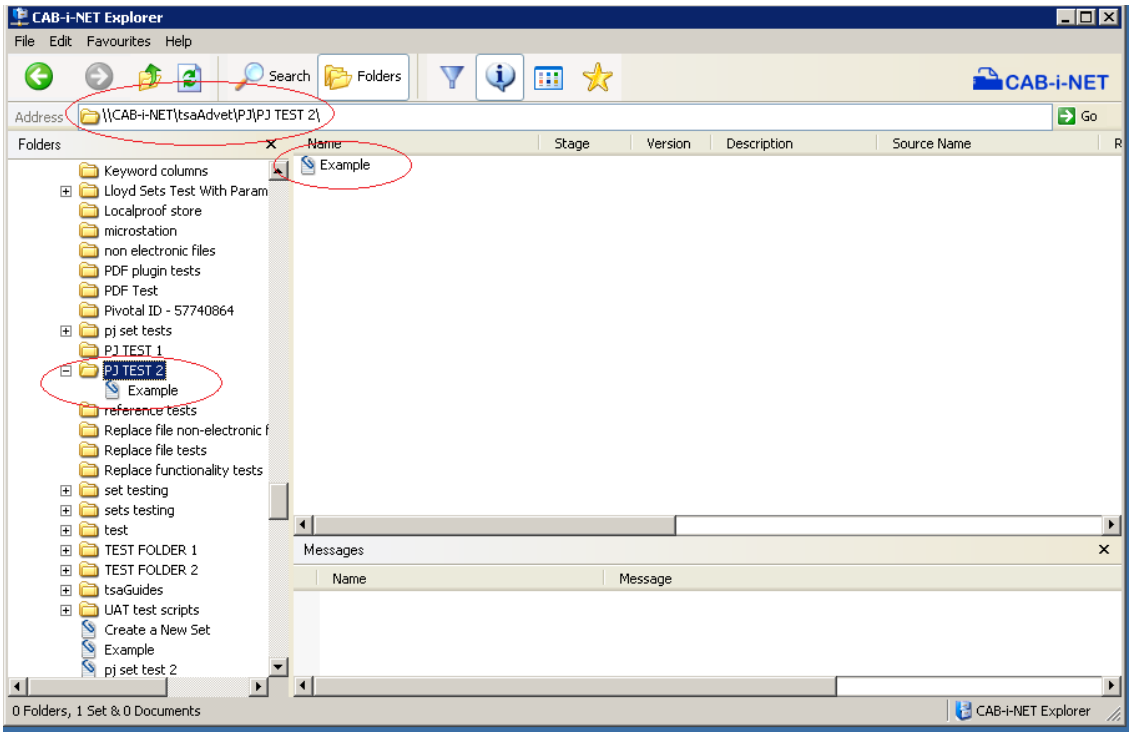


Figure 126

Double click on the Set you have just moved, the documents which were part of the Set have also been moved.

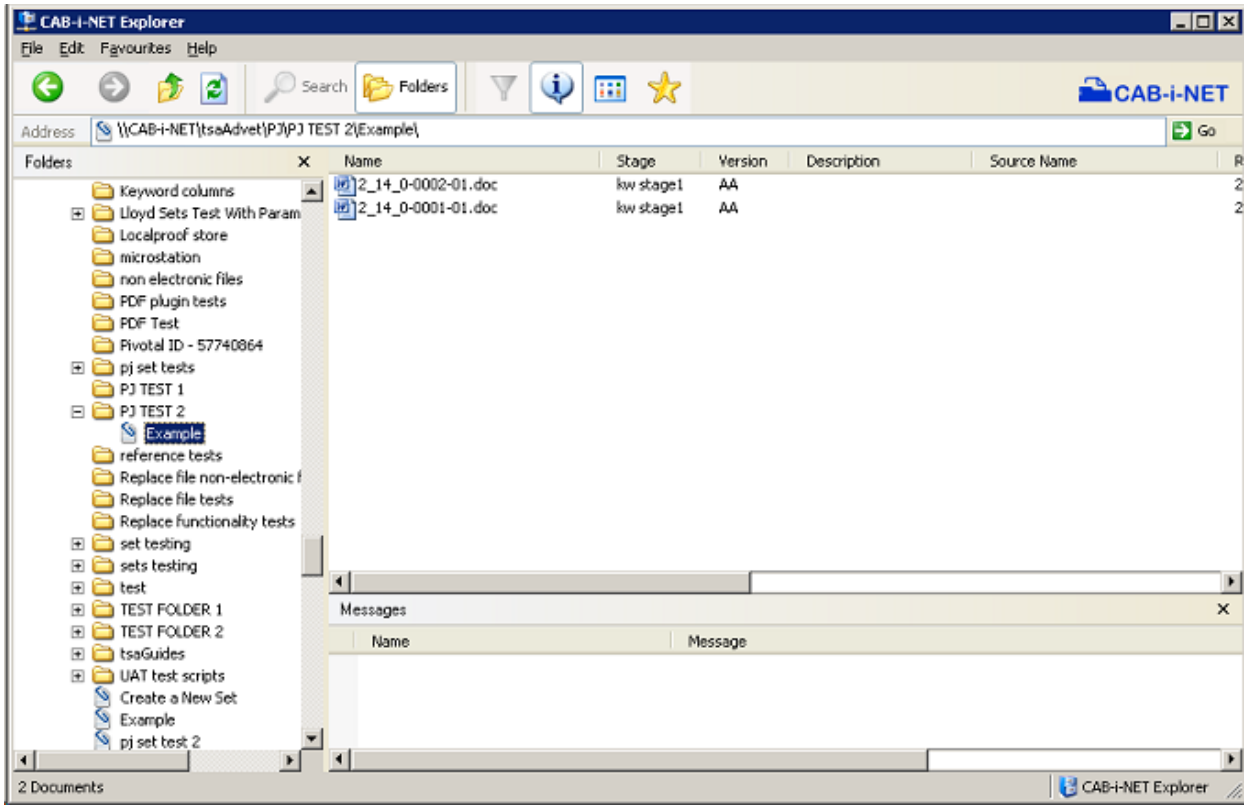


Figure 127

Double click on the Set you have just added the multiple files too, and check that the files are shown.

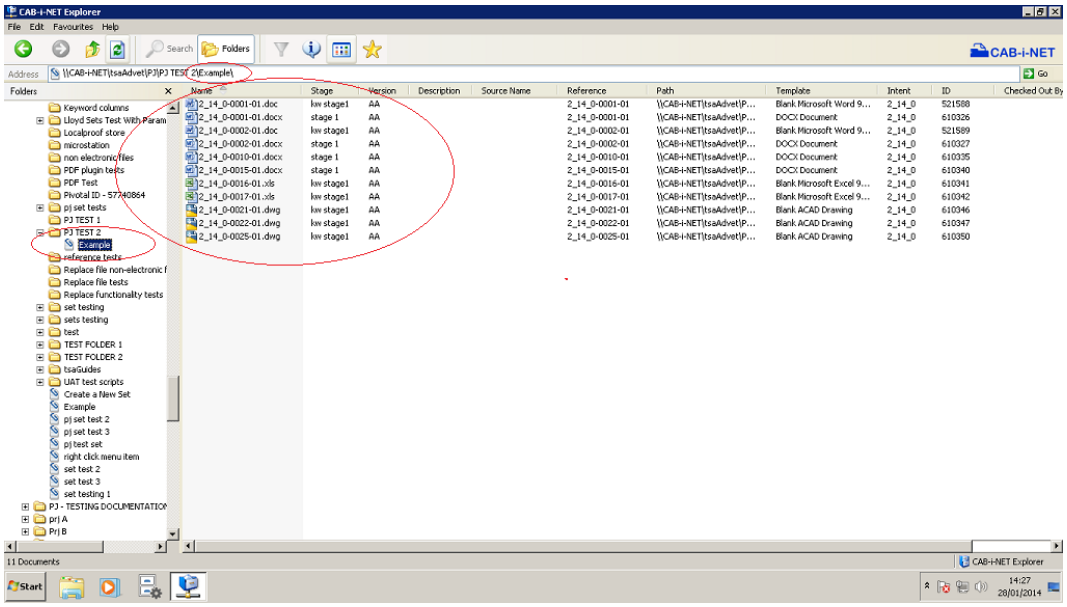


Figure 128

Deleting a Set

In this section it shows you how to delete a Set, should the need arise in the future, right-click on the Set you wish to delete and select the delete option from the menu items

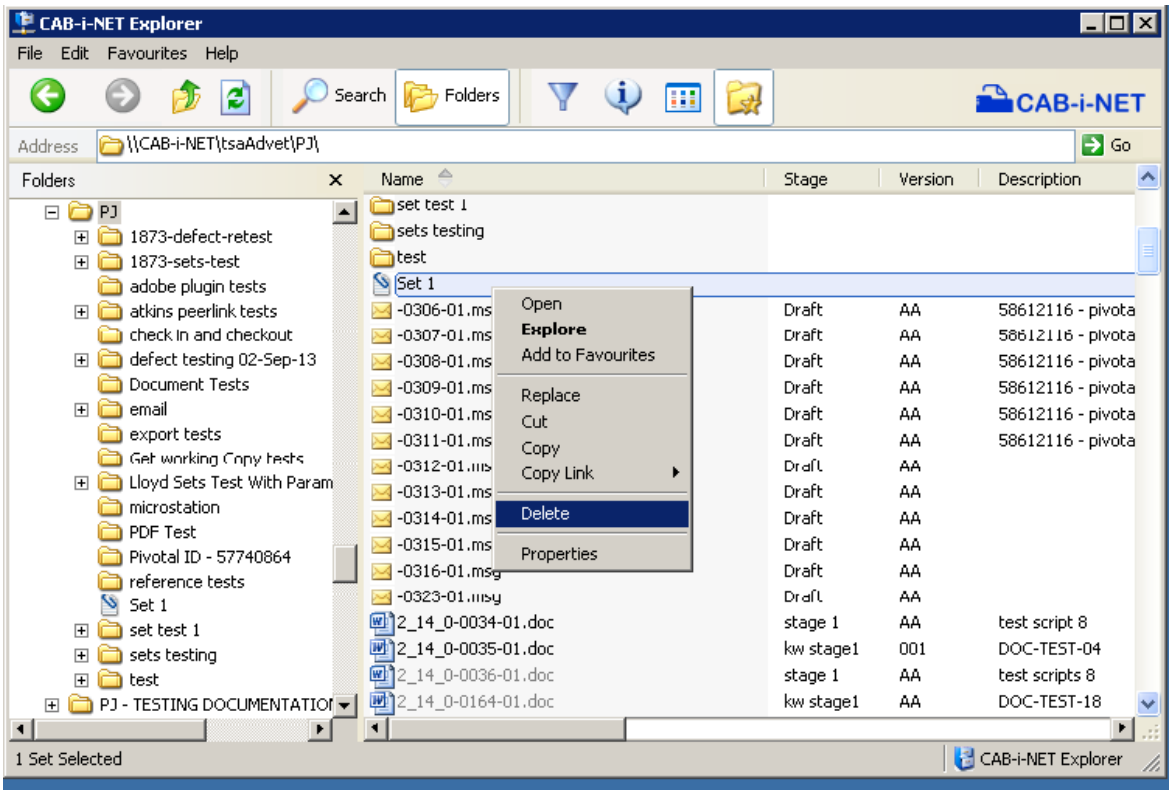


Figure 129

Once you have clicked on the Delete option the following message box will be displayed.

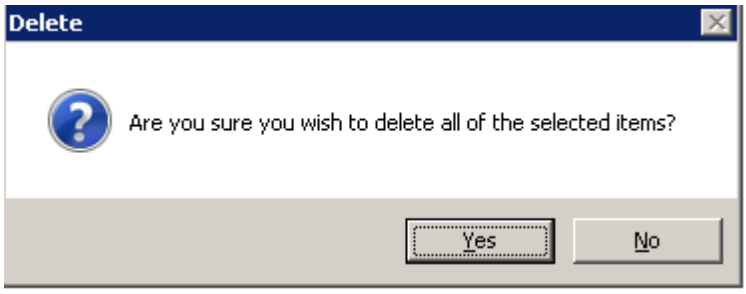


Figure 130

If you select the Yes button the set will be deleted and removed from the listview.

Working with Workflows

To perform a workflow action on a document, select it in a folder or in *Documents For My Attention*. Multiple documents may be selected, if their workflow and their current stage are the same.

In the right-click menu, select *Workflow* and the appropriate option.

Note: A user must be assigned to a group which has the *Workflow Documents* permission in the relevant folder, to enable the *Workflow* menu when right-clicking documents.

Depending on the workflow configuration, the items in the workflow menu may be displayed in a maximum of four groups as shown.

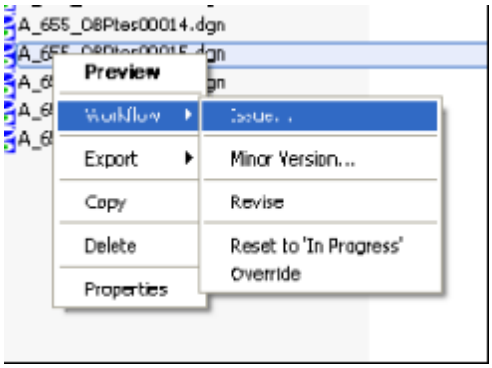


Figure 131

The groups are arranged in the following order, from top to bottom.

Transitions assigned to user.	Items only appear in workflow menu of users who are assigned to the transition.
Transitions the user can perform.	Items available to all workflow users who have a role for the transition.
Stage actions.	Actions available to any user at this stage, for example revise action.
Privilege actions.	Actions available to a user in a group that has workflow privilege or privileges

In the following example, a *Send for Review* transition is performed, requiring nomination of users for the next workflow stage.

Send for Review

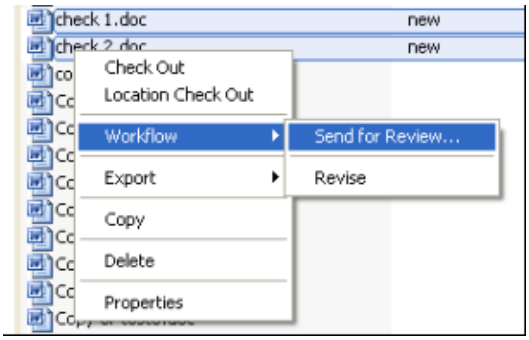


Figure 132

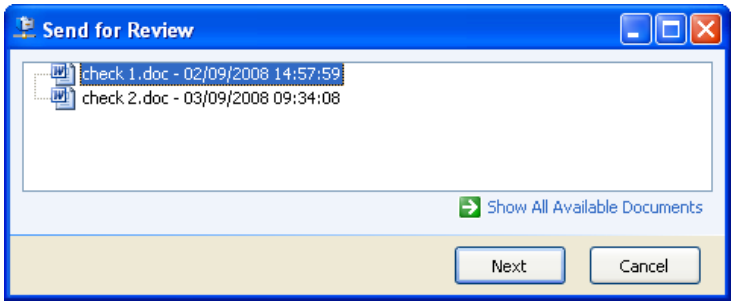


Figure 133

Click *Next*, or *Show All Available Documents* to view and select other documents to be included.

Figure 134

Leave notes as appropriate and click *Next*.

Review and Send for Approval

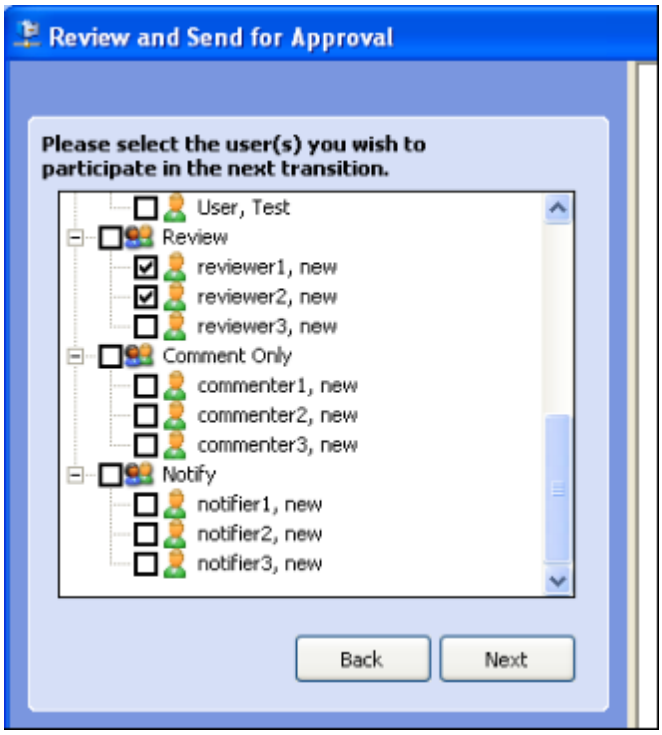


Figure 135

Users and their roles are listed, for nomination in the next stage.

Note: These users have roles assigned in the Workflow Users page, and they are members of a group with *Workflow Documents* permission in the relevant folder.

Tick the appropriate users and click *Next.*

A message is displayed, confirming that the transition is completed. The document will appear in the nominated users' *Documents for my Attention* for further processing

Accepting / Rejecting documents

When a *Review* transition is selected in the workflow menu, the *Progress so far…* screen shows the current workflow state.

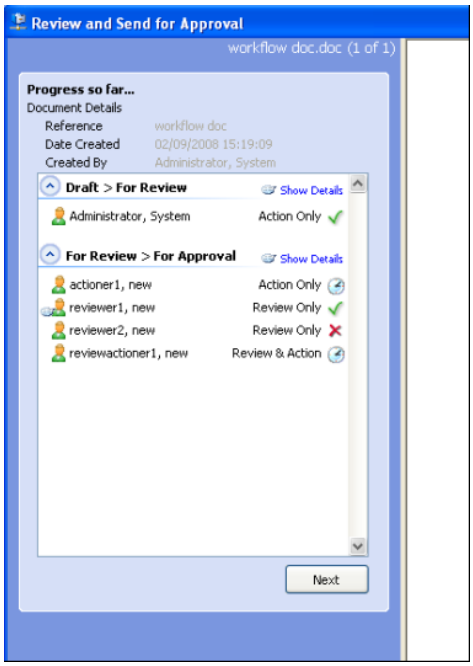


Figure 136

Symbol	Description
	Awaiting the named user's response.
	Accepted by the named user.
	Rejected by the named user.

All of the *Reviewers* (or Review & *Actioner*s) must respond by accepting or rejecting the document. When the last *Reviewer* responds, the document is ready to be taken to the next transition by an *Actioner* (or a *Review & Actioner*). This user must decide to accept or reject the document, based not only on their own review but also taking into account the other *Reviewers*' or *Commenters*' acceptance or rejection, and any comments they may have entered.

Click *Show Details* to view workflow users' comments (if applicable) and the date and time when their response was made. Click *Next*.

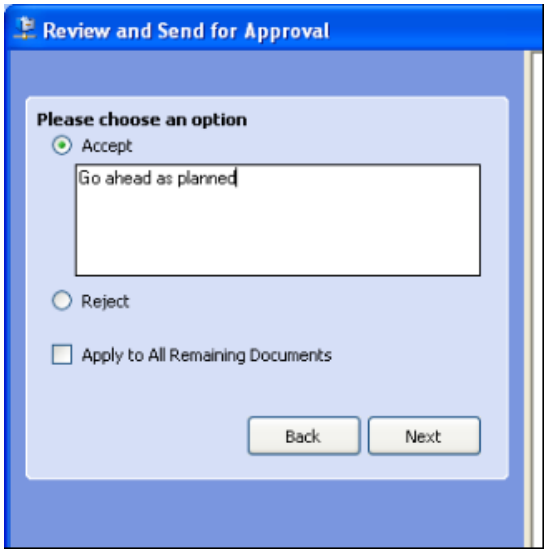


Figure 137

- Review the document displayed.
- Click either the *Accept* or *Reject* radio button.
- Enter any comments as required.
- Tick *Apply to All Remaining Documents* if applicable. If the checkbox is not ticked, the review and accept/reject is repeated for each document.
- Click *Next*.

On completion, a confirmation message is displayed.

Redlining documents

It is possible to mark-up the published file and save the edits, if suitable pdf software is installed and the transition configuration allows editing of the published file. The title bar shows Available for Markup and Comment as shown below.

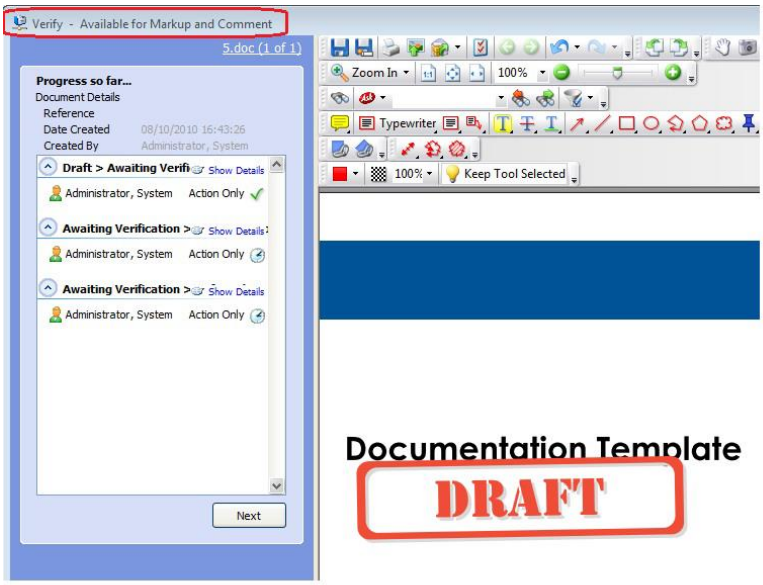


Figure 138

Remember to save the edits before the *Next* button in the workflow wizard is clicked.

If the transition does not allow editing, the title bar shows *Read Only*. An example is shown on the next page.

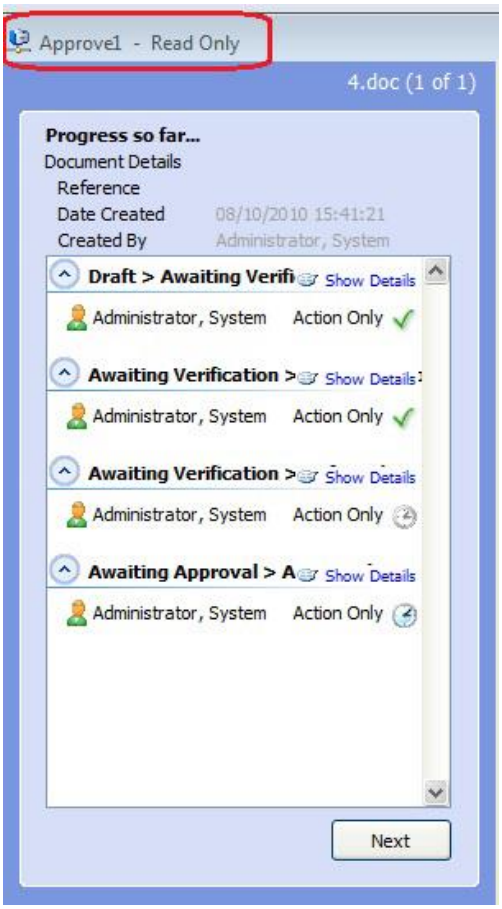


Figure 139

Overriding a Workflow

If a user is absent, in some circumstances it may be necessary to override the workflow of documents that are awaiting their Review and/or Review & Action responses. In this case, a user with an Override privilege can select Override in their workflow menu.

Having overridden the workflow, the user, or any user with an Action role, can take the documents through a workflow transition. The override is recorded in the document history.

Workflow with Password Protection

A workflow stage can be configured to request a password, when attempting to move away from that stage. The following section details the password protection procedure.

Select a Document which is at a password protected stage and attempt to perform a workflow action.

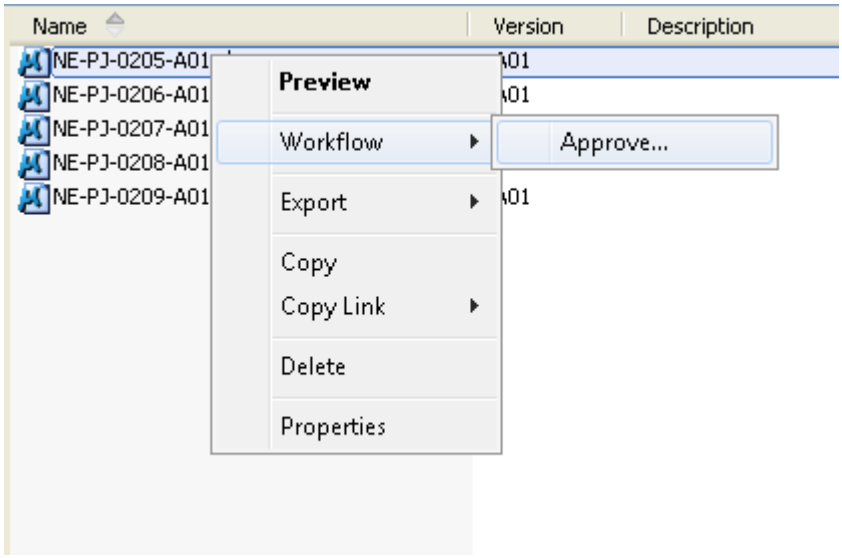


Figure 140

Once you have selected the workflow action you wish to perform (as in the case shown above it is an Approval). On the next page is the screen which you will see.

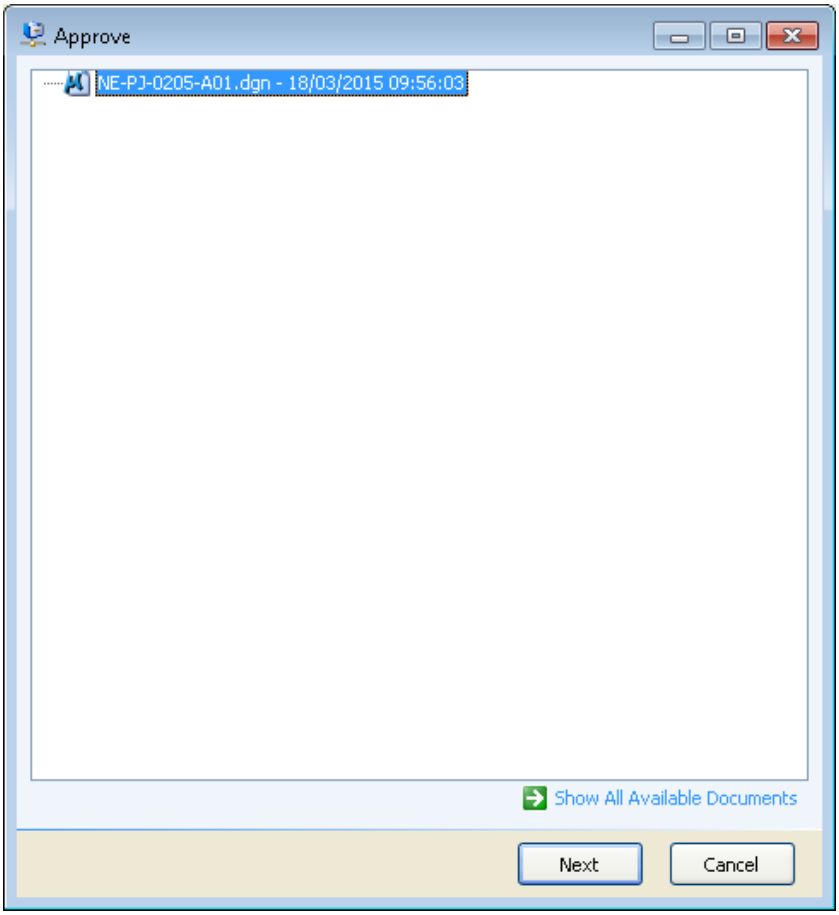


Figure 141

Now if you click on the *Next* button and a Cabinet Verify Credentials box is displayed.

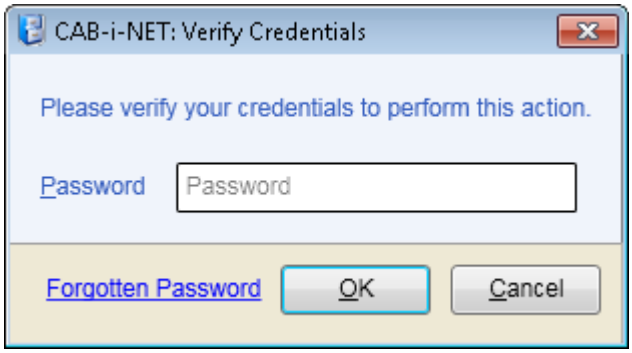


Figure 142

Enter your password then click on the 'OK' button to continue.

The first time you have to verify your credentials you will see the following screens.

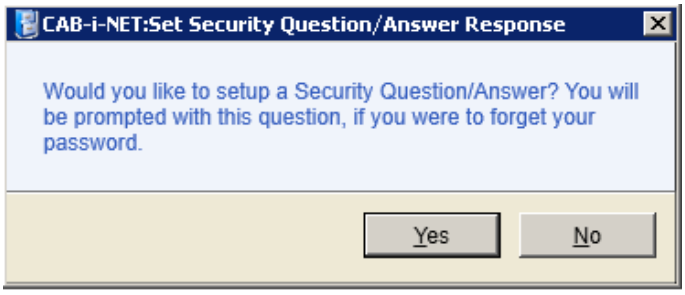

CAB-i-NET:Set Security Question/Answer Response
Would you like to setup a Security Question/Answer? You will be prompted with this question, if you were to forget your password.
Yes
No

Figure 143

Click on the 'Yes' button and the Cabinet: Setup Security Question box will be displayed (see below).

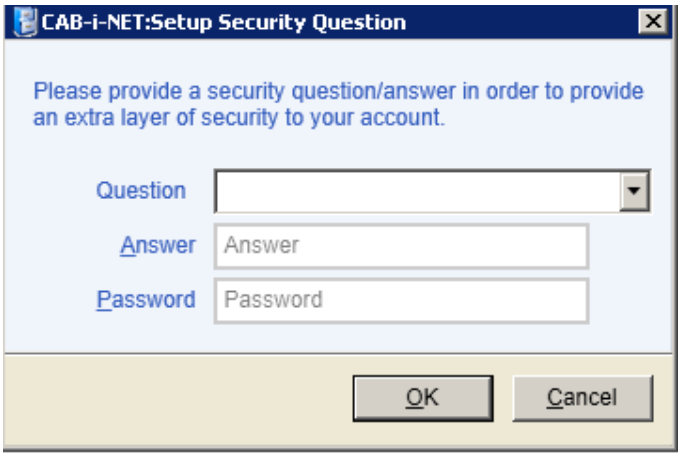


Figure 144

From the drop down box select any question you wish (see below).

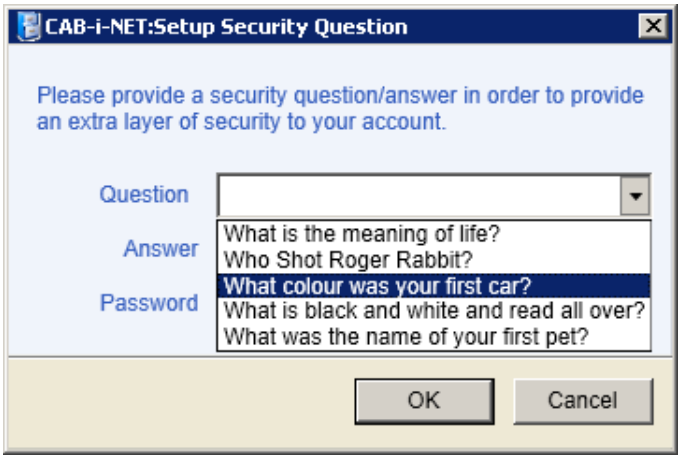

CAB-i-NET:Setup Security Question
Please provide a security question/answer in order to provide an extra layer of security to your account.
Question
Answer
Password
What is the meaning of life?
Who Shot Roger Rabbit?
What colour was your first car?
What is black and white and read all over?
What was the name of your first pet?
OK
Cancel

Figure 145

Now complete the remaining fields as appropriate, then click on the 'Ok' button.

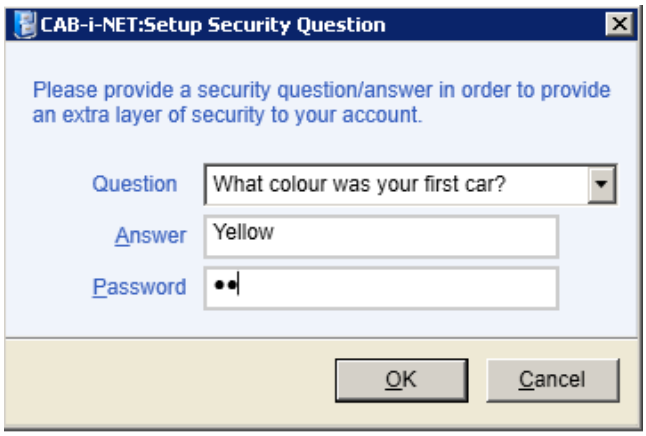


Figure 146

If your password does not meet the minimum length a warning message will be displayed.

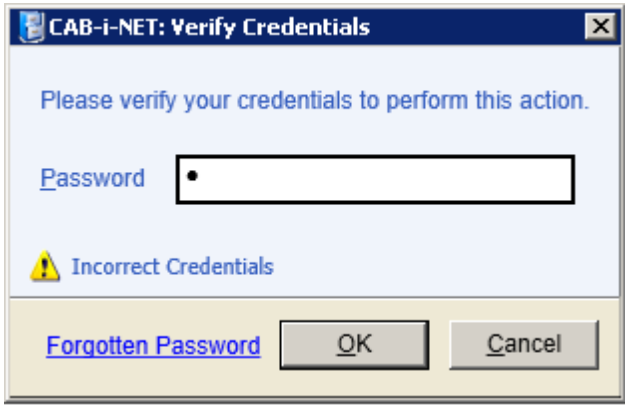


Figure 147

Re-enter your password so that it meets the minimum length required, once done click on the 'OK' button.

Forgotten Password

If you should forget your password you can click on the 'Forgotten Password' link shown on the login box below.

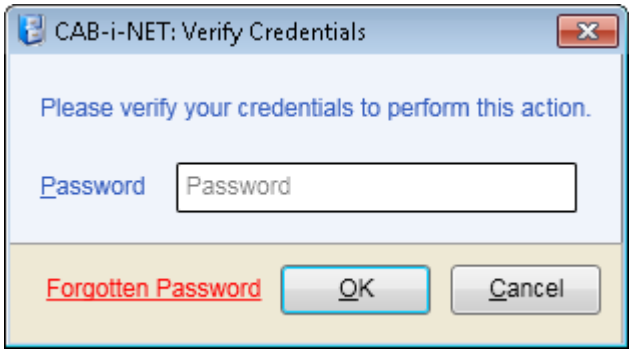


Figure 148

If however in the unfortunate event of maybe forgetting your password you can click on the Forgotten Password link and the following message box will be displayed.

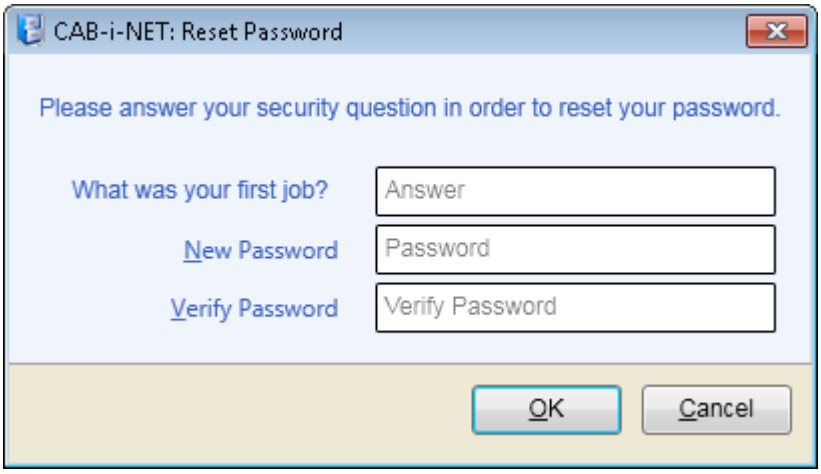


Figure 143

Answer the security question then complete the remaining fields with the appropriate answers. Once answered click on the 'OK' button, you will need to enter your new password.

Once you have entered your new password then the normal workflow process will begin.

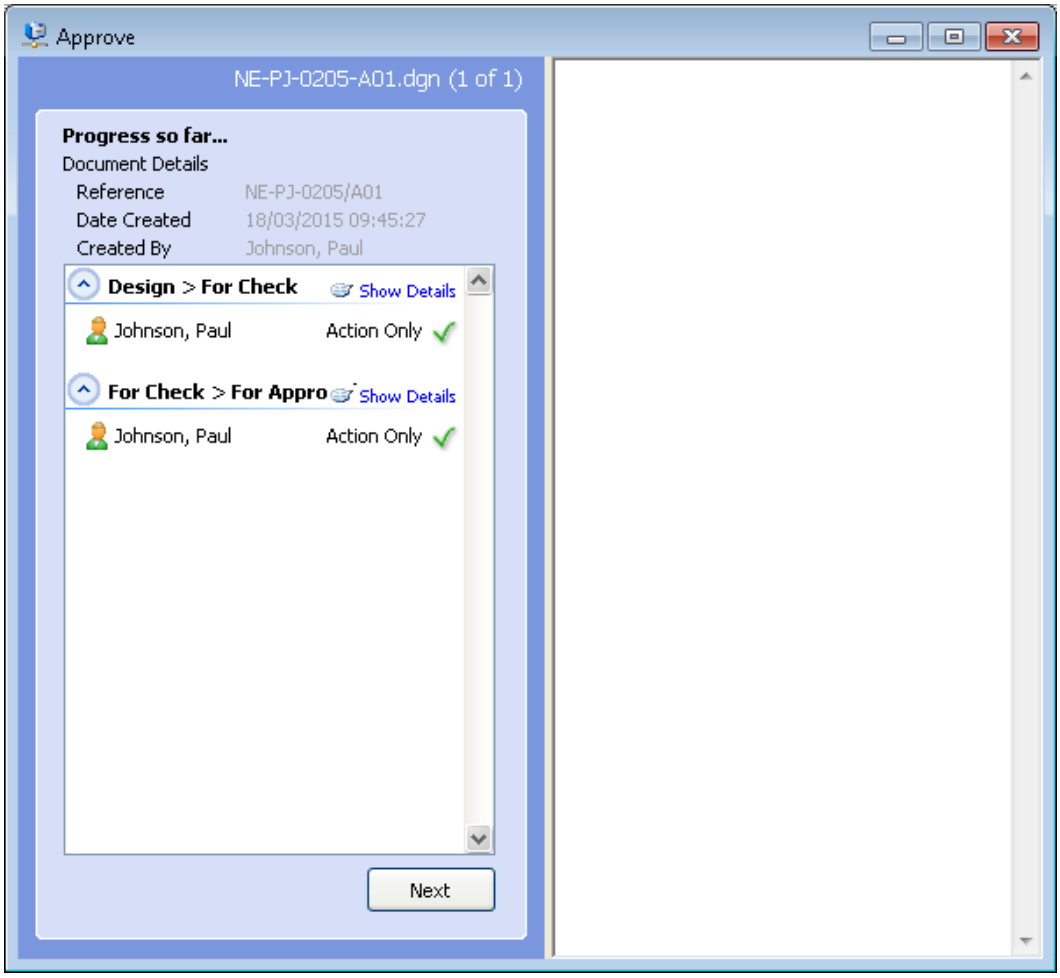


Figure 143

Now click on the *Next* button to continue, the screen is shown on the next page.

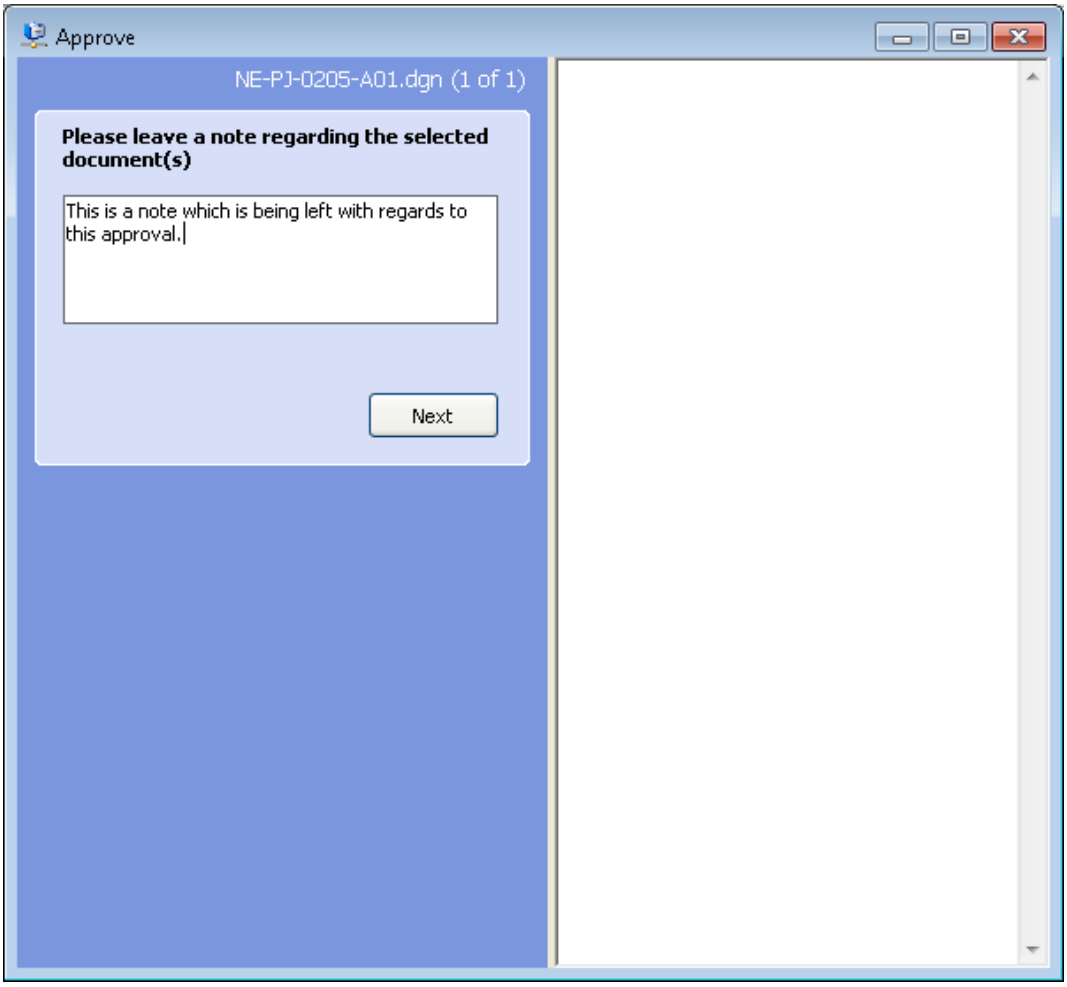

Approve
NE-PJ-0205-A01.dgn (1 of 1)
Please leave a note regarding the selected document(s)
This is a note which is being left with regards to this approval.
Next

Figure 144

Click on the *Next* button to continue, the screen is shown on the next page.

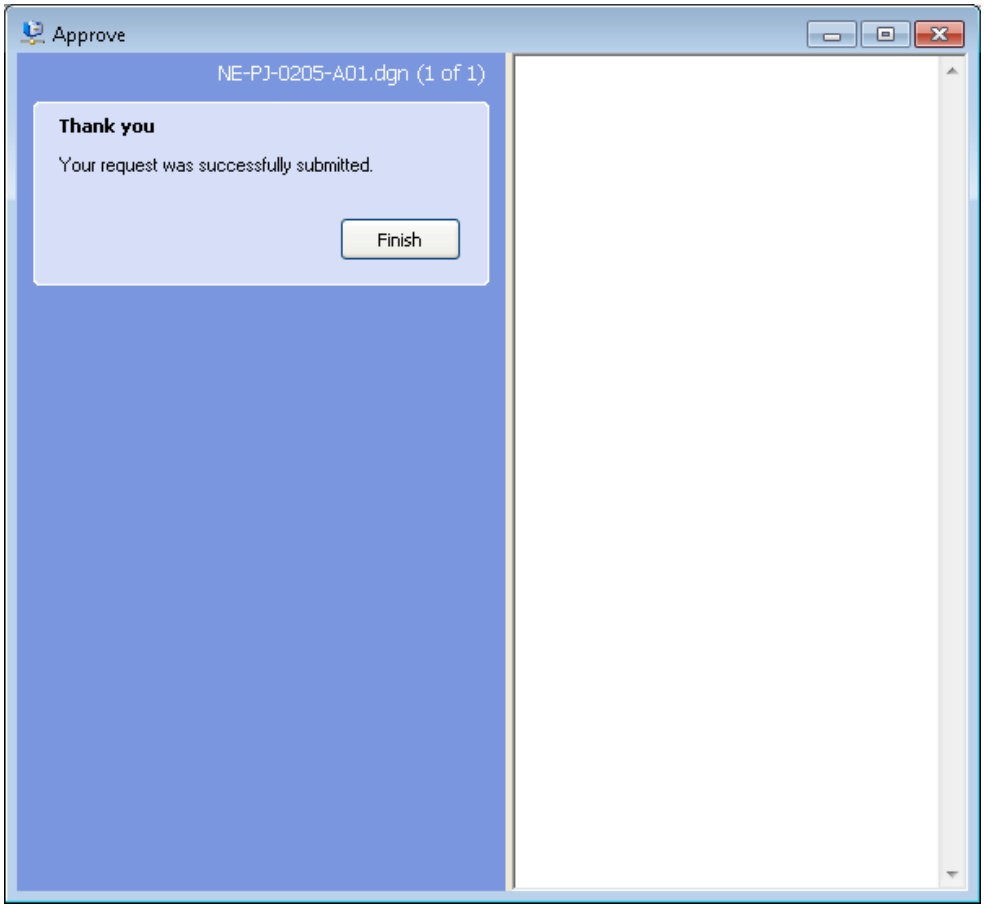


Figure 145

Click on the *Finish* button to finish.

Required Reference Stage

This section outlines the functionality of the required reference Stage and the reasoning behind why this functionality was introduced as an enhancement.

The main reason is due to the potential time difference between a user submitting a drawing for processing and it actually being processed (i.e. queue volume). During which time the content of the referenced models could have changed.

Therefore locking the references prior to submitting the drawing for processing is the preferred solution and one which has to be completed by the system.

Cabinet Explorer has been developed to include a Stage Configuration which on workflow a drawing locks all of its references. This locking is achieved by changing the Stage of the references to one which has been configured to not allow edit. Furthermore this Stage will have been configured so that the only option available to the user is to unlock the file, a configuration which simply revises the reference to an editable Stage.

The user is warned if they are about to lock any of the drawing's references, allowing them to make an informed decision as to whether or not to continue the workflow action. It also informs the user if the drawing cannot be processed due to any of its references being Checked Out, if they are in a non-lockable Stage or if they do not have permission to perform that workflow action.

An example is shown below, showing a drawing in a Stage which is configured to abide by these rules.

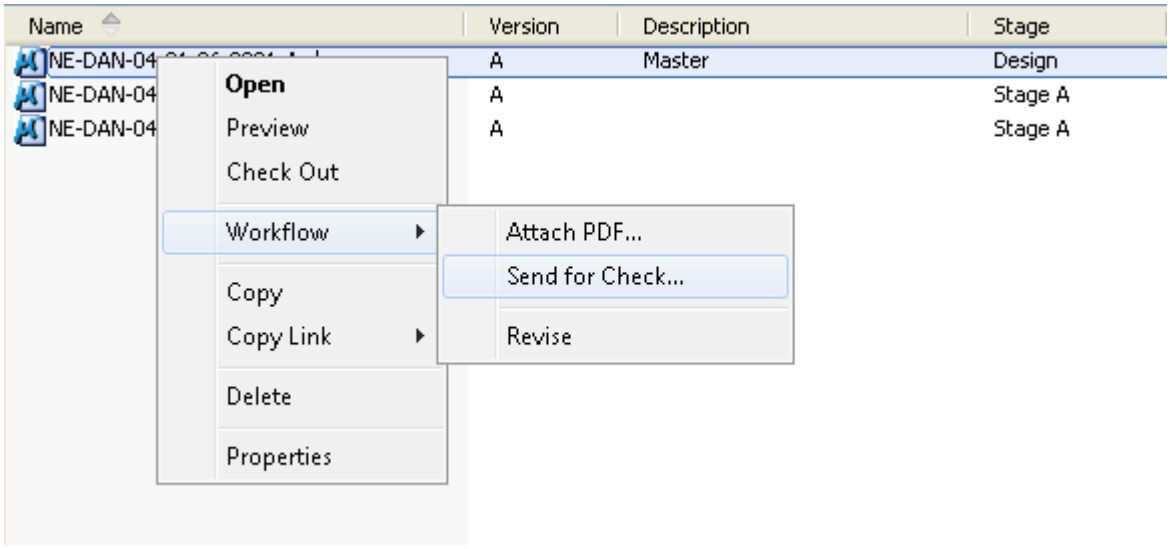


Figure 146

Performing a workflow action (as shown above), results in the 'Workflow Action Validation' form being displayed (shown on the next page).

The Workflow Action Validation screen.

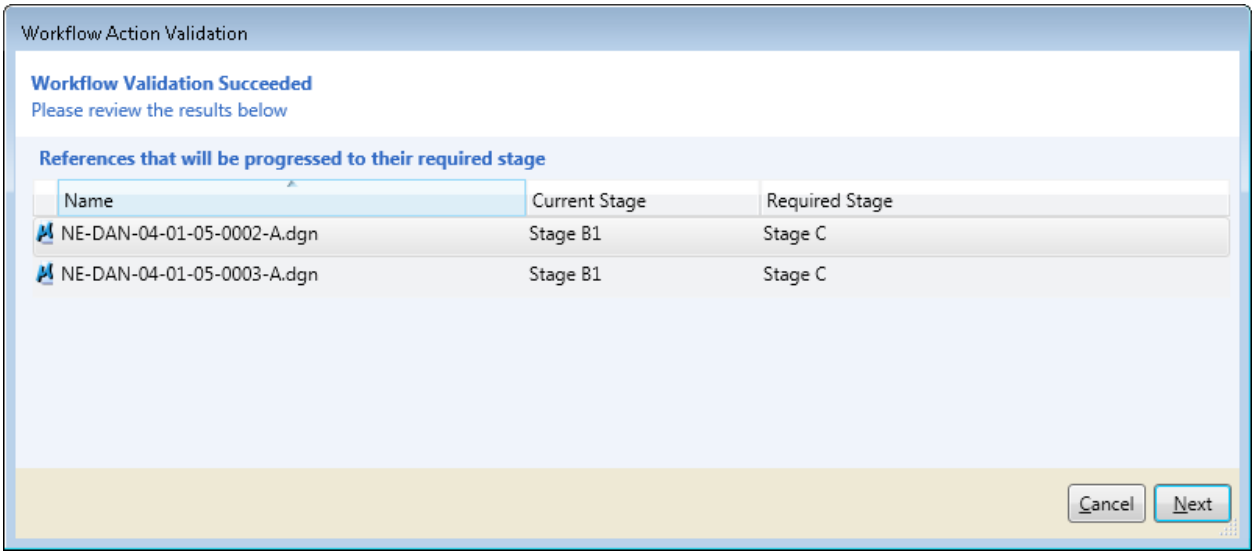


Figure 147

Click on the *OK* button to continue.

Click on the 'Next' button and a Processing references form will be displayed (see below).

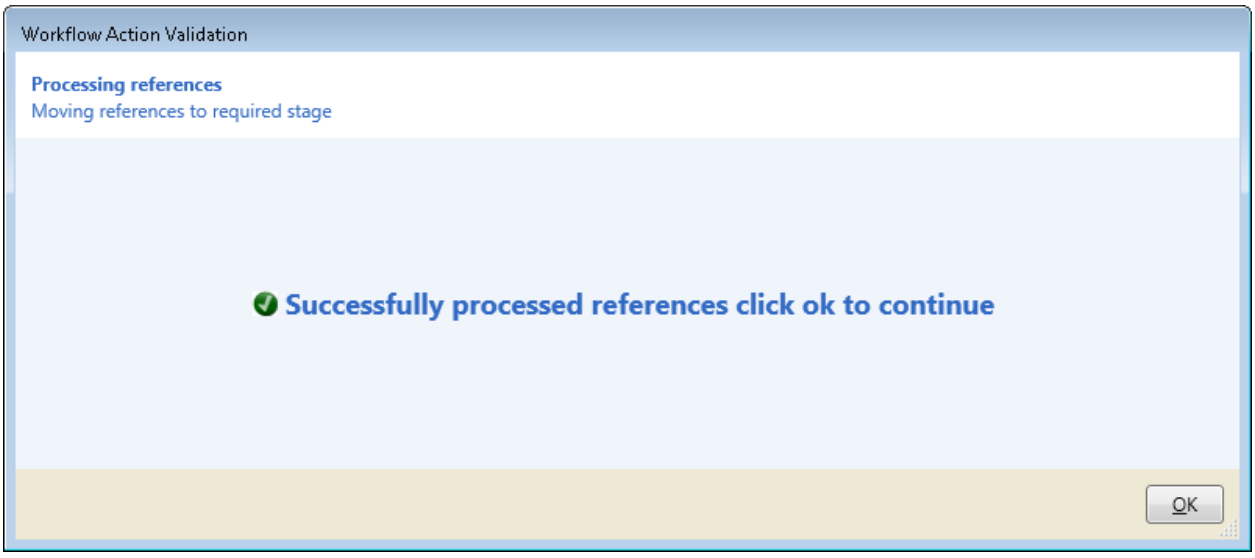


Figure 148

By clicking on the 'OK' button the workflow wizard will then continue as normal.

This is the *Send for Check* screen you can leave any notes in the text field.

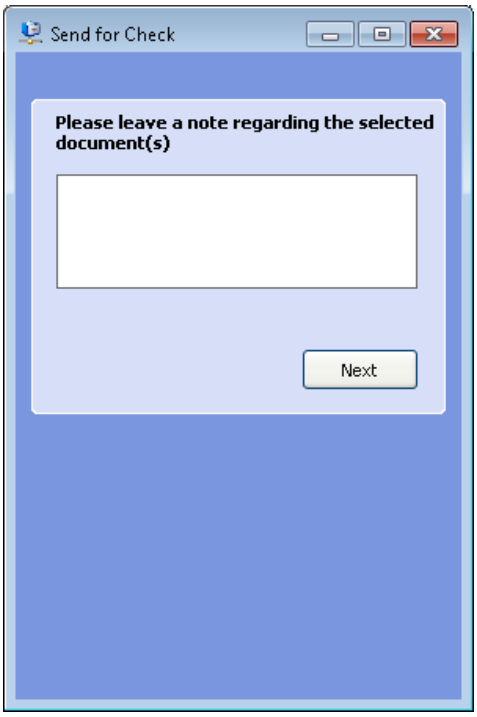


Figure 149

This is the *Send for Check* screen once you have completed any notes.

Figure 150

If a drawing has one or several references which fail the validation, the following form will be displayed.

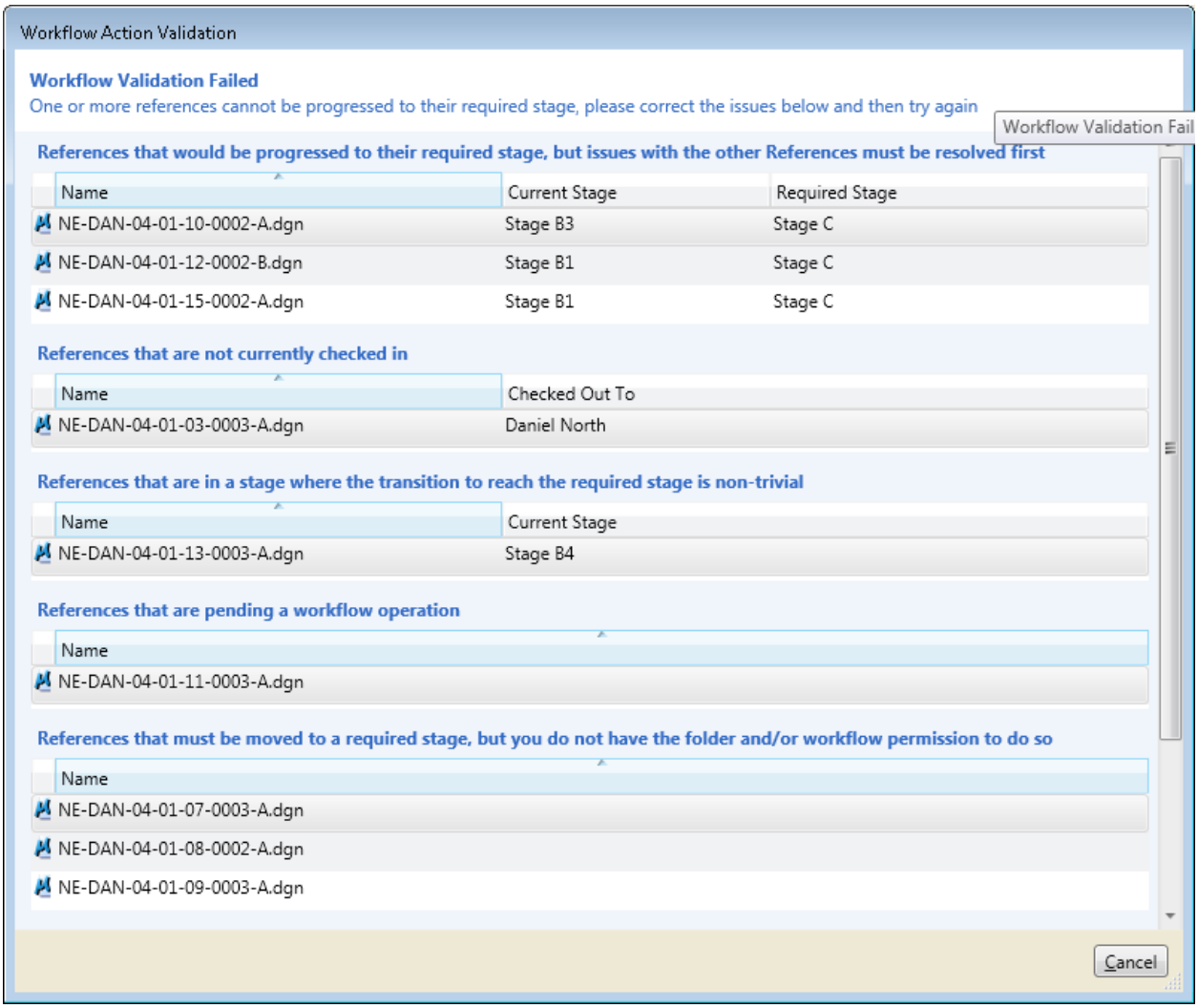


Figure 151

If you click on the 'Cancel' button the 'Workflow Action Validation' form will close, and the workflow wizard will not be displayed (i.e. the workflow action is cancelled).

Importing Documents to a Folder

Single File Type

Select the required folder by clicking on it in the folder tree. In the document list, right-click and select *Import* from the menu.

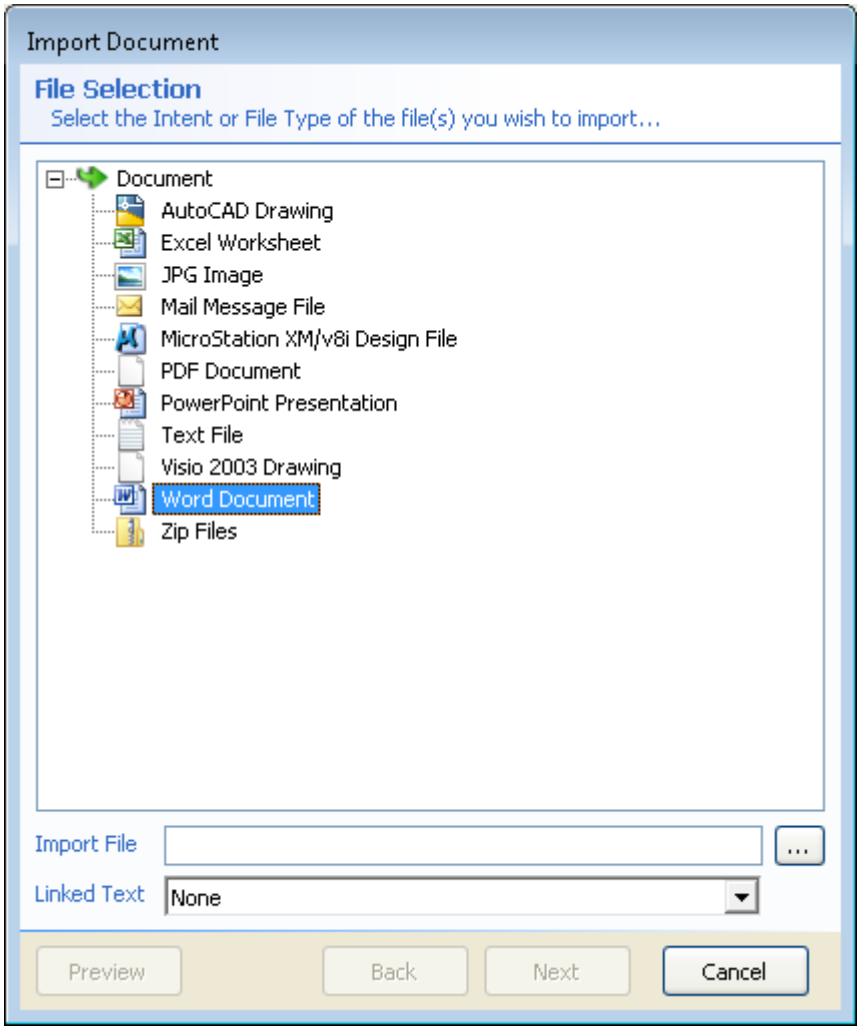


Figure 152

Expand the *Intents* tree and select the file type to be imported. The file types that are available depend on the Intents that are set up for this folder.

Click the '…' button and browse to the location of the file or files to be imported. Select the file(s) and click *Open*.

Accept the displayed *Link Text* IDL group or select it if applicable and click *Next*.Enter document keywords as required and click *Next*.

The Import Document “Document Keywords” screen.

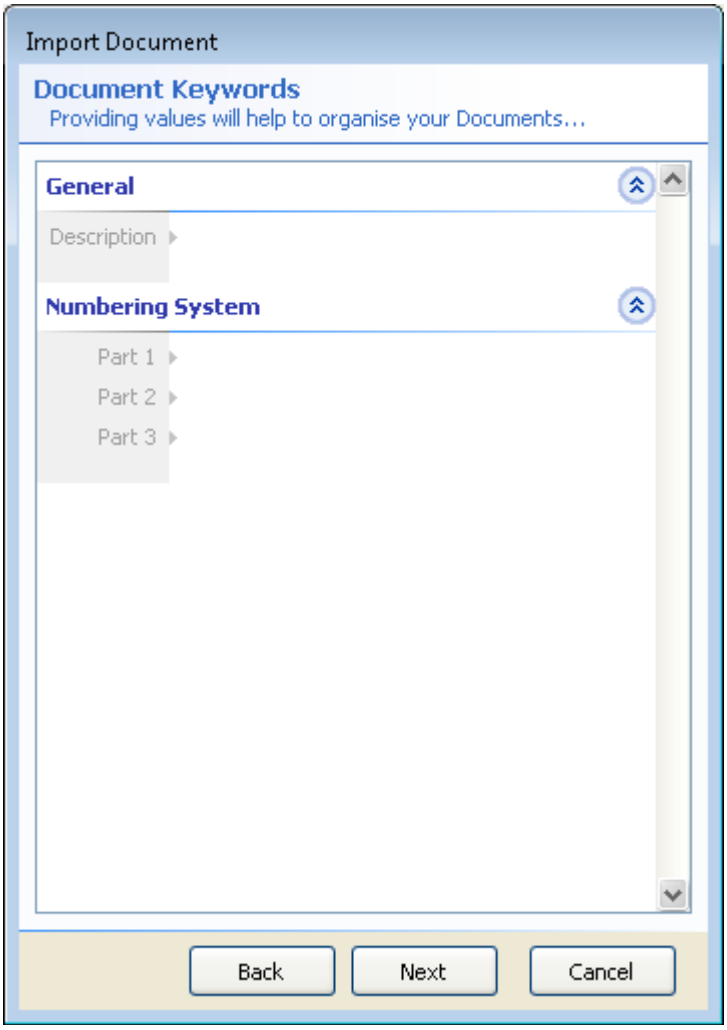


Figure 153

In the Description field you can enter anything which is relevant for your Document Keywords, you may also choose what number format you wish to use for a particular document.

This is the Import Document “Filename and Reference” screen.

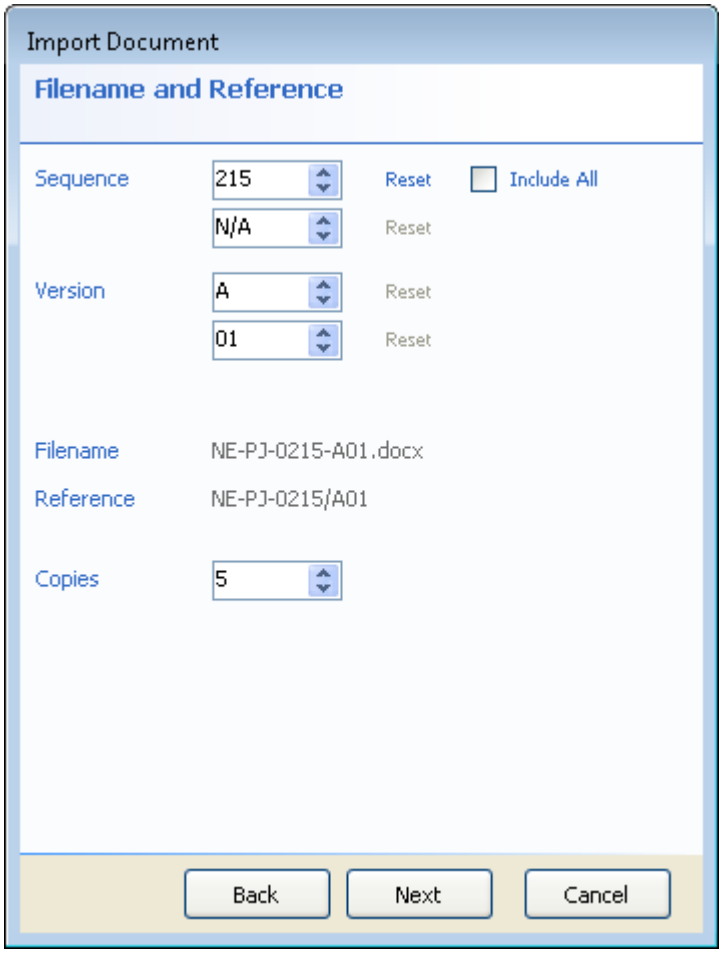


Figure 154

If required, adjust the sequence number using the up or down arrows. If more than one copy of each document is required, set the *Copies* number and click *Next*.

The *Final Confirmation* page shows the document numbers which will be created. If the numbers are OK, click *Finish* to import the documents.

The source file name of an imported document can be viewed in the document list by selecting it in the folder's Details View.

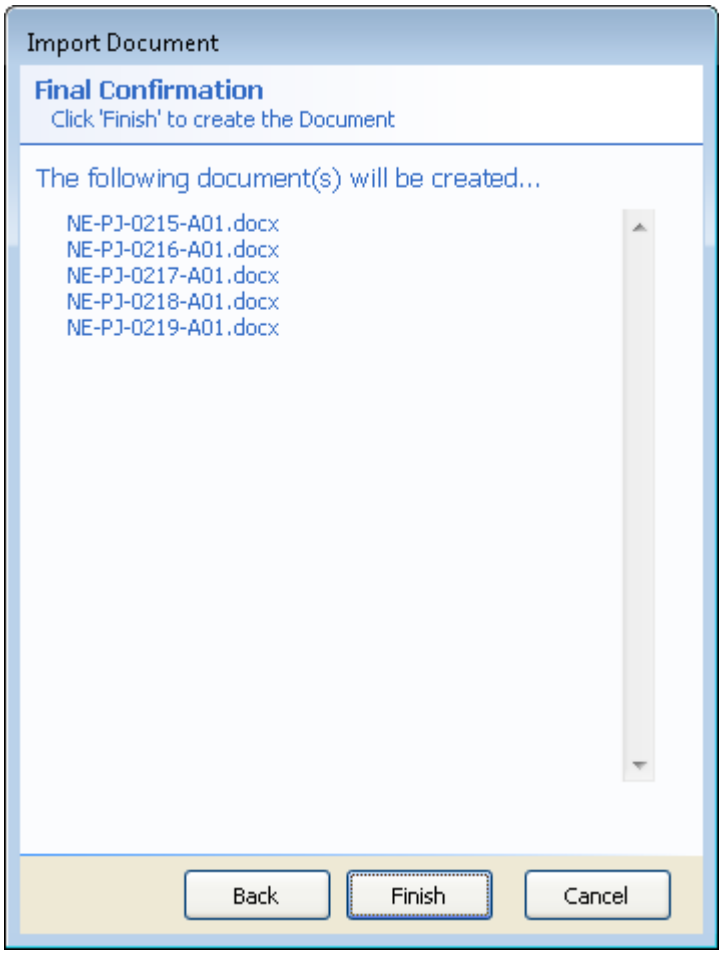


Figure 155

Multiple File Types

Select the required folder by clicking on it in the folder tree.
In the document list, right-click and select *Import* from the menu.

In the file selection page, select the required **Intent** as shown below, so that the file types listed under that Intent can be imported.

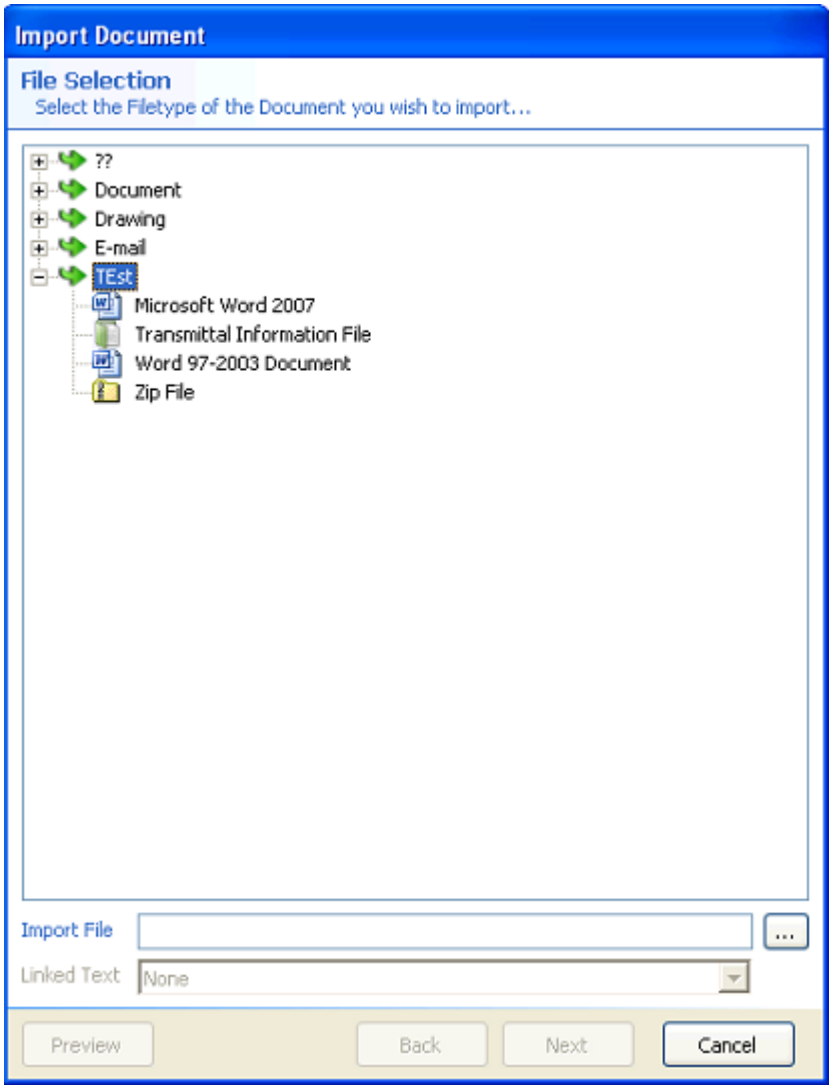


Figure 156

Click the button labelled '...' and select the required documents to be imported. Note that they must be located within a single folder.

When the required documents as selected, click *Next.*

The Imported File Type Confirmation Screen.

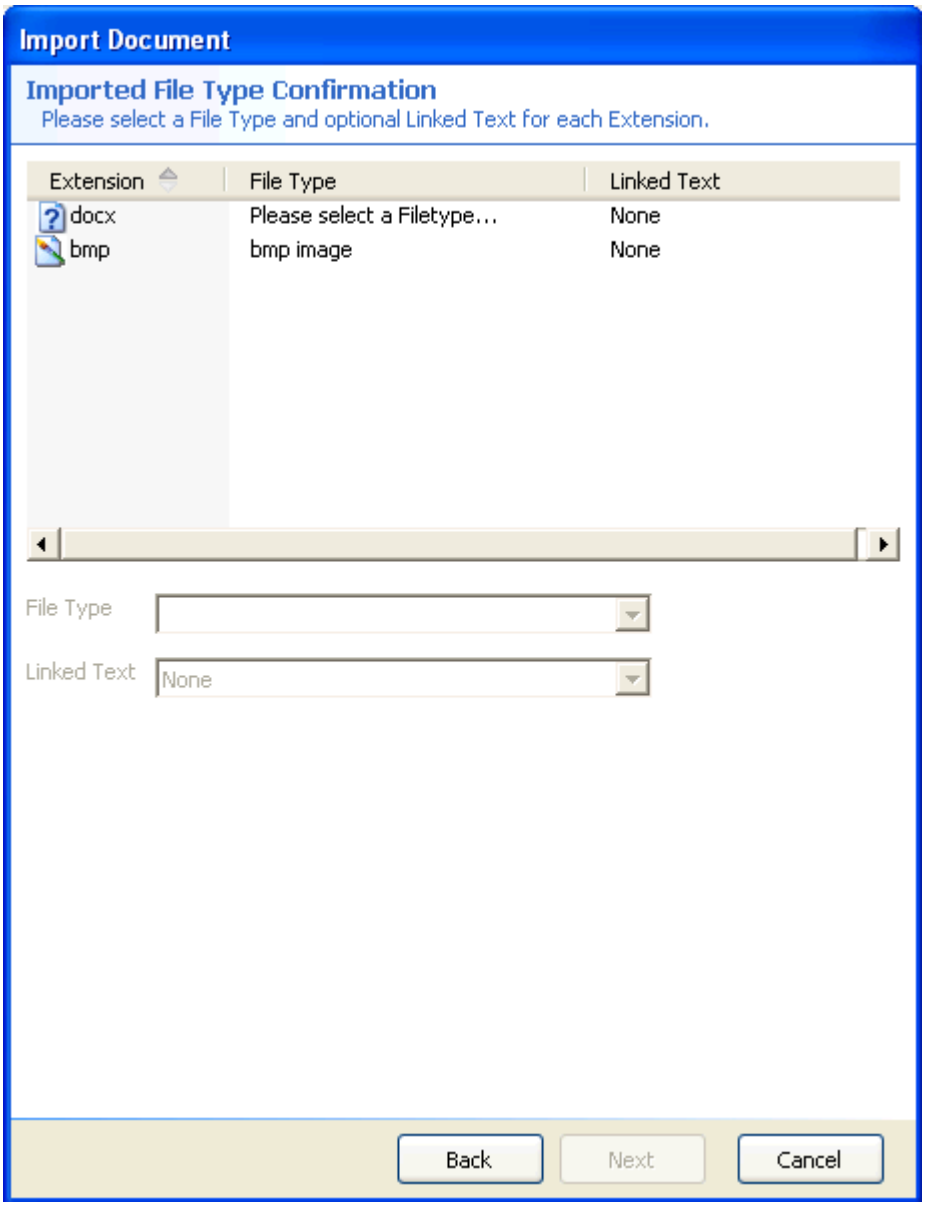


Figure 157

If indicated, select an appropriate filetype, as shown above. Depending on User Preferences, a prompt may be displayed to select the required Linked Text (IDL Group) for each file extension listed, or a default selection is made.

Continue through the remaining pages of the Import Document wizard.

Importing Documents from CII

In the folder tree, right-click on the folder into which documents are to be imported from a CII file. In folder properties, click on *Import Documents from CII* to display the *Attach Document Wizard*.

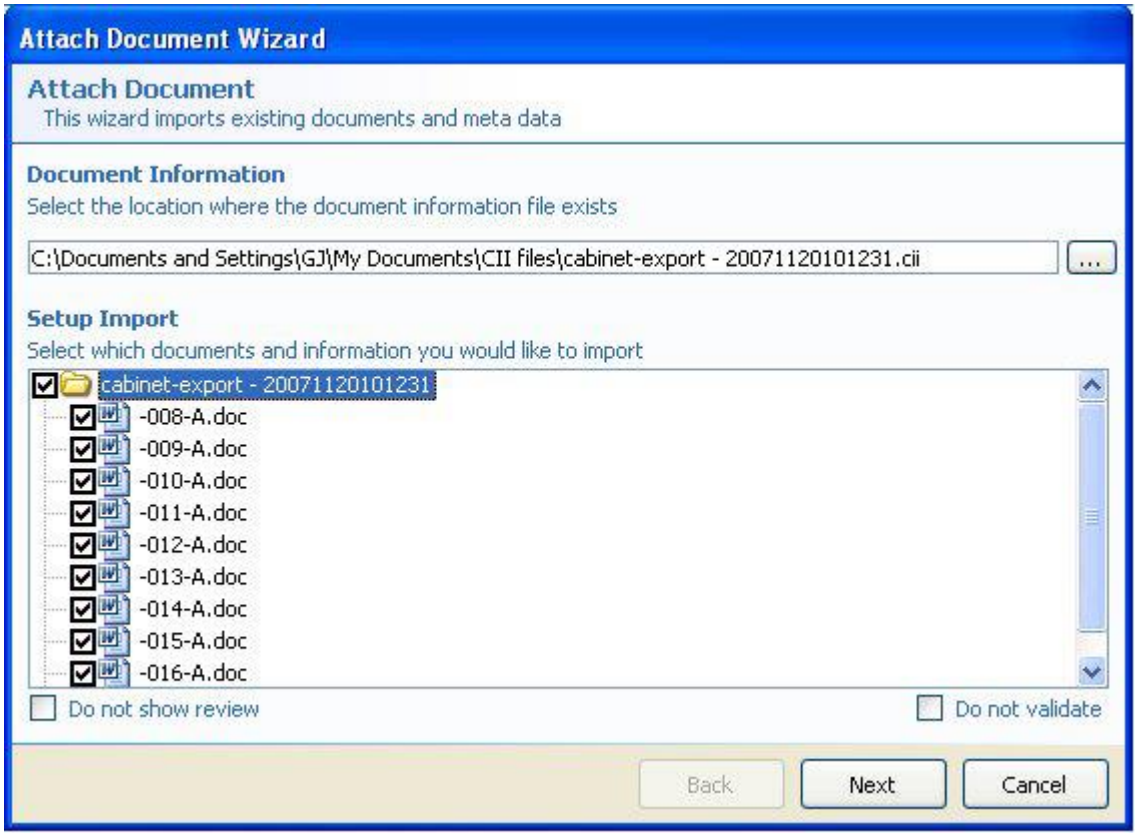


Figure 158

Click the '…' button to browse for the location of the required .cii (Cabinet Import Information) file. In the Setup Import box, select which documents are to be imported.

Do not show review	Do not show a review of the import process.
Do not validate	Import using the CII file without validating it.

Notes

1. This item must be selected if the files being imported are to be renamed by the folder's numbering system.
2. This item speeds up processing, but documents may not be successfully imported if invalid data is found.

Click *Next* to display the review screen. If options must be set up for successful import, shown in red in the columns displayed, right-click on single or multiple documents and select from the menu as shown.

The Attach Document Wizard.

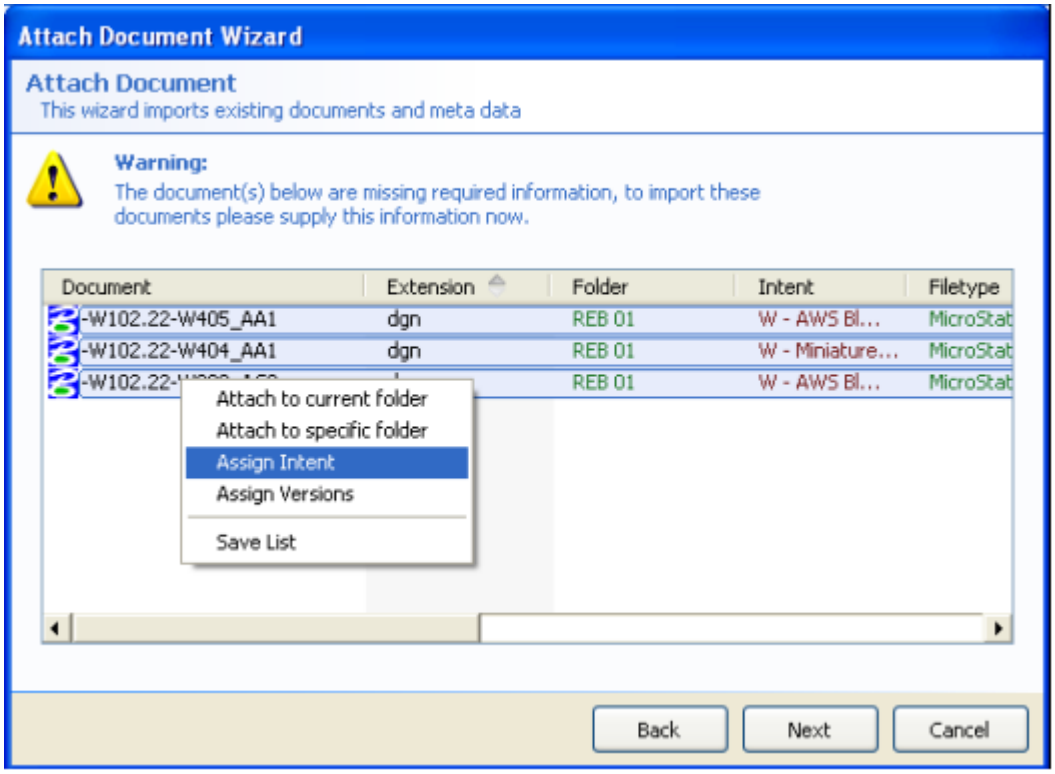


Figure 159

Attach to current folder	Import the selected document to the current destination folder.
Attach to specific folder	Select an alternative destination folder for import of the selected document.
Assign Intent	Select an appropriate Intent from those available in the destination folder.
Assign Versions	Select sequence and version characters.
Save List	Save the listed information (for all the import files) in an XML file.

Version and Sequence Setup screen.

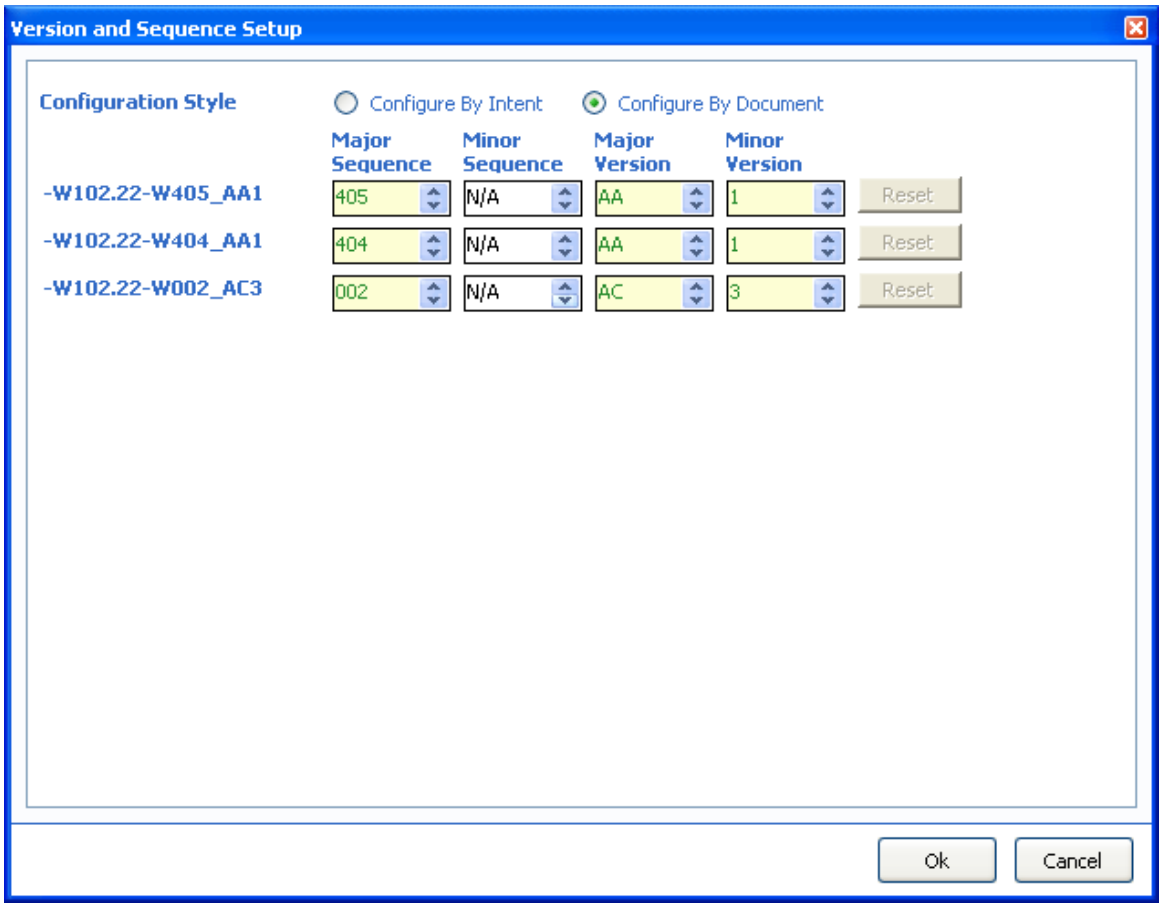


Figure 160

If *Configure by Intent* is selected, the documents are grouped by their Intent name instead of their document number.

The example and table below illustrate potential issues which may occur:

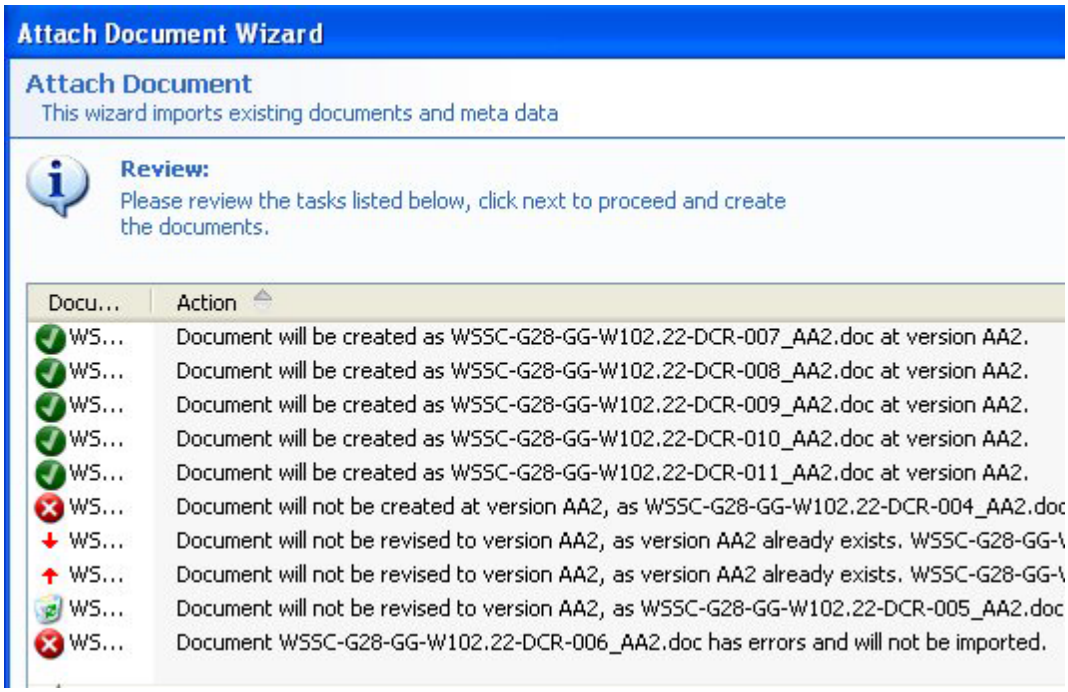

Attach Document Wizard
Attach Document
This wizard imports existing documents and meta data
Review:
Please review the tasks listed below, click next to proceed and create the documents.
Docu...
Action
WS... Document will be created as WSSC-G28-GG-W102.22-DCR-007_AA2.doc at version AA2.
WS... Document will be created as WSSC-G28-GG-W102.22-DCR-008_AA2.doc at version AA2.
WS... Document will be created as WSSC-G28-GG-W102.22-DCR-009_AA2.doc at version AA2.
WS... Document will be created as WSSC-G28-GG-W102.22-DCR-010_AA2.doc at version AA2.
WS... Document will be created as WSSC-G28-GG-W102.22-DCR-011_AA2.doc at version AA2.
WS... Document will not be created at version AA2, as WSSC-G28-GG-W102.22-DCR-004_AA2.doc
WS... Document will not be revised to version AA2, as version AA2 already exists. WSSC-G28-GG-
WS... Document will not be revised to version AA2, as version AA2 already exists. WSSC-G28-GG-
WS... Document will not be revised to version AA2, as WSSC-G28-GG-W102.22-DCR-005_AA2.doc
WS... Document WSSC-G28-GG-W102.22-DCR-006_AA2.doc has errors and will not be imported.

Figure 161

Symbol	Description	Override
	The destination folder already has the document at the current revision.	
	The existing document is at a higher revision than the CII revision. By default, the document will not be imported.	
	The CII document is at a higher revision than the existing document, but the higher revision exists in the document history. By default, the document will not be imported.	
	The CII document is at a higher revision than the existing document. The higher revision does not exist in the document history. By default, the document will be imported.	
	The document has been deleted but still exists in the recycle bin.	
	The document has errors or was not found in the source folder.	

Note

If the document is to be revised to allow import, select the document and select *Revise Document* in the right-click menu. It will be revised from the current version to the CII import document version (see below). The relevant override symbol should then be displayed in place of the symbol prior to revision.

If a document is right-clicked, the following menu is displayed.

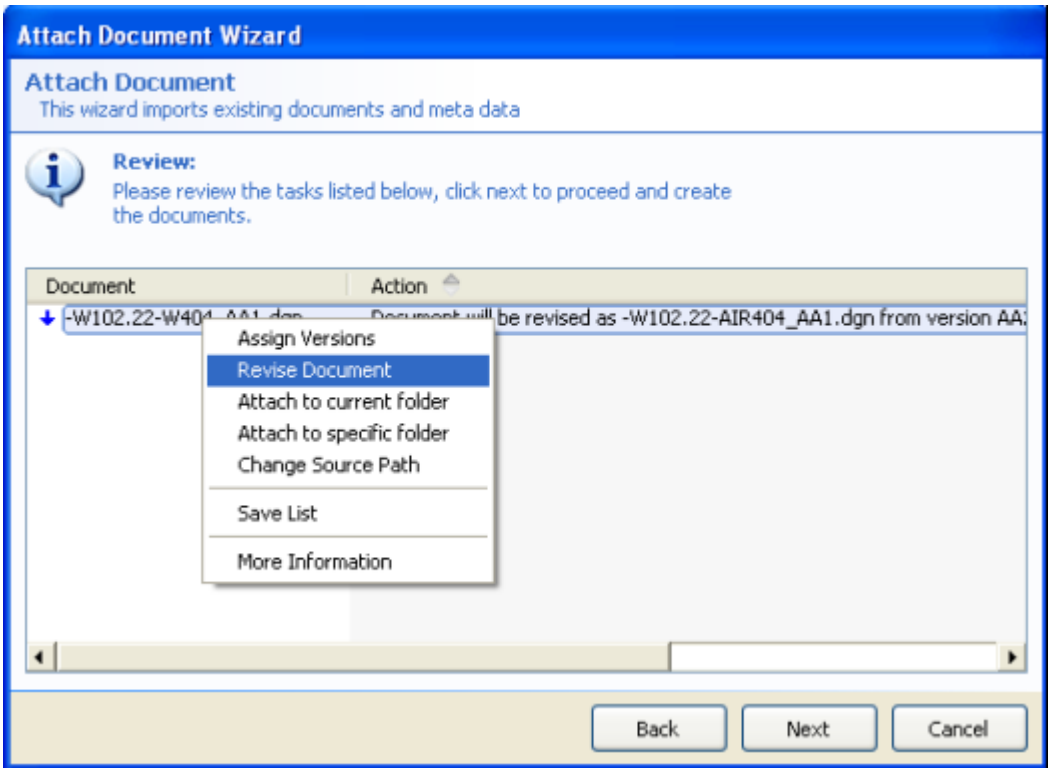


Figure 162

Assign Versions	Set up the sequence and version number.
Revise document	Revise the document number. Refer to the *Action* column for version information.
Attach to current folder	Import the document to the current folder.
Attach to specific folder	Select an alternative destination folder for import of the selected document.
Change source path	Select an alternative path for the source document.
Save List	Save the listed information in an XML file.
More Information	Display more information for the selected document.

When Next is clicked, the final Attach Document Wizard screen is displayed, with information on any documents which were not imported.

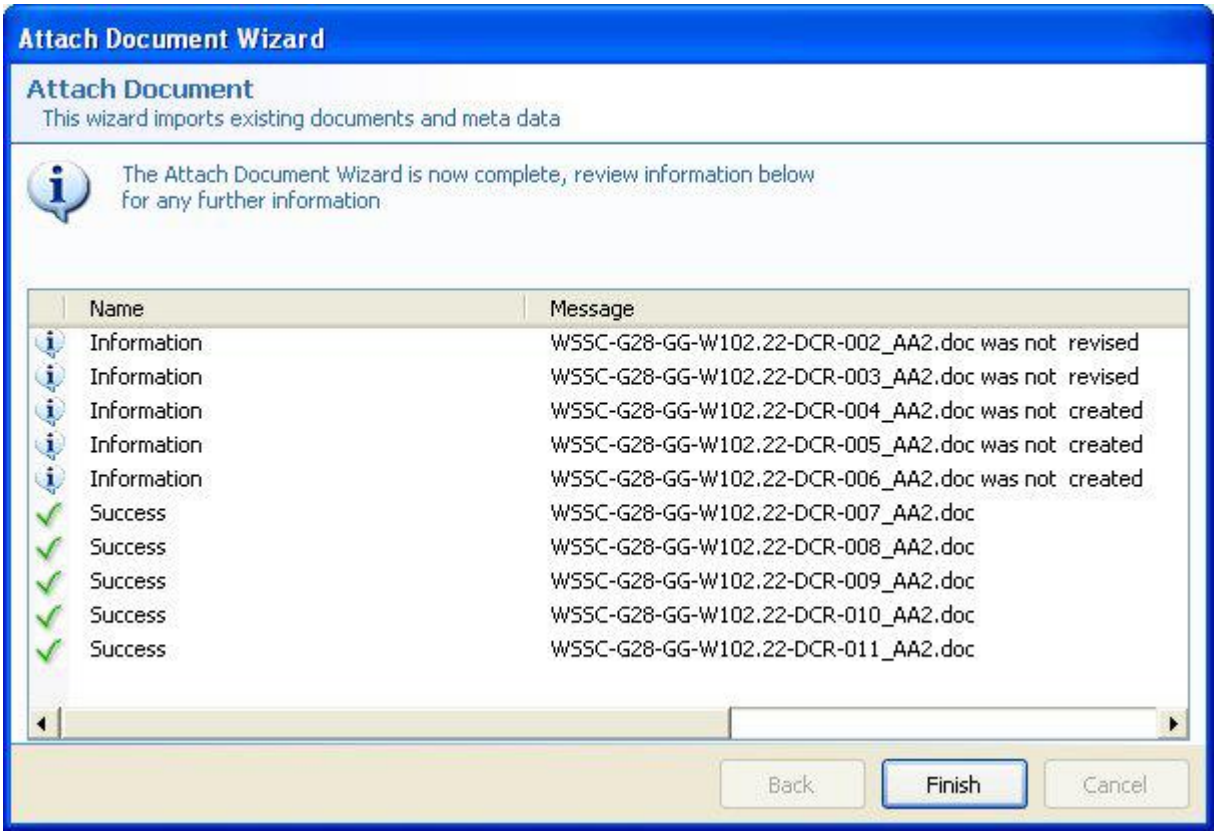


Figure 163

The list can be saved as an XML file by selecting Save List from the right-click menu.

Purging or restoring from the Recycle Bin

Either:

- Right-click on the Instance name in the tree view and select *Properties*.
- Select *Recycle Bin* at the left of the form.

Or

- Right-click on a folder name and select *Folder Properties*.
- Select *Recycle Bin* at the left of the form. The Recycle Bin opens with the current folder selected, if it has deleted content (folders and / or documents).

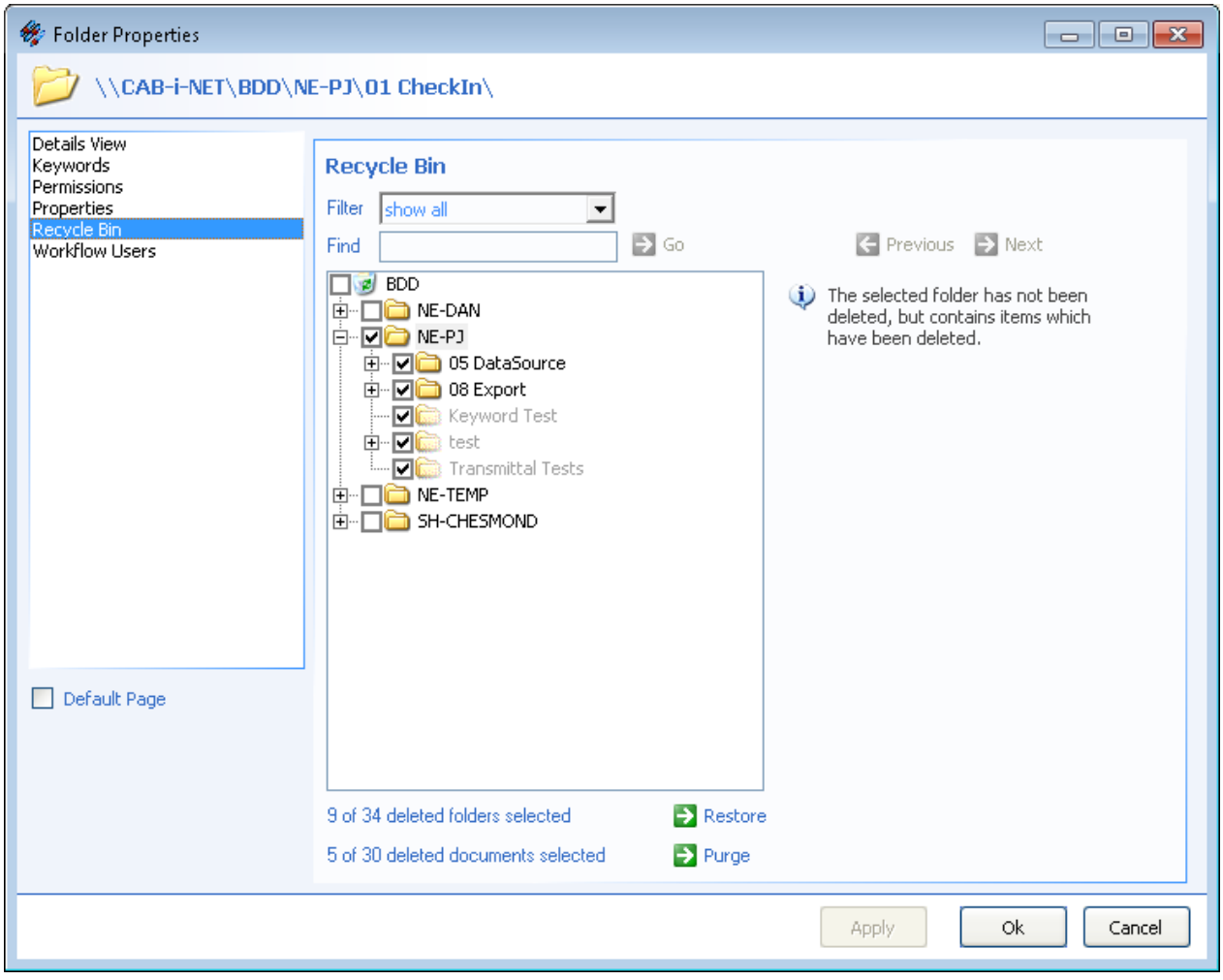


Figure 164

To show only folders and / or documents that satisfy a deletion date condition, click on the *Filter By Date* drop-down list and select the required option.

Expand the folder tree to view subfolders and documents. Those that are shown in grey type have been deleted and sent to the recycle bin.

To search for folders or documents:

- Enter the name or part of the name in the *Find* textbox and click *Go*.
- Click *Next* or *Previous* to select other search matches.
- Search results can be filtered by deletion date, by selecting a *Filter By Date* option (for example ‘today’,’within the last week’ etc).

Select the appropriate folders or documents and either purge (permanently delete) them or restore them to Cabinet Explorer.

Copying and Pasting Documents

Note:

The source document names of pasted documents can be viewed in the document list, by editing the Details View of the folder.

Single Document

Select the document to be copied from the source folder, right-click and select *Copy* from the menu.

Navigate to the destination folder.

Document with a numbering system

Right-click and select *Paste* or *Paste Special* from the menu:

- If *Paste* is selected, the document is pasted with its next available document number.
- If *Paste Special* is selected, the filename and reference can be adjusted according to the numbering system for this folder, as shown in the following example.

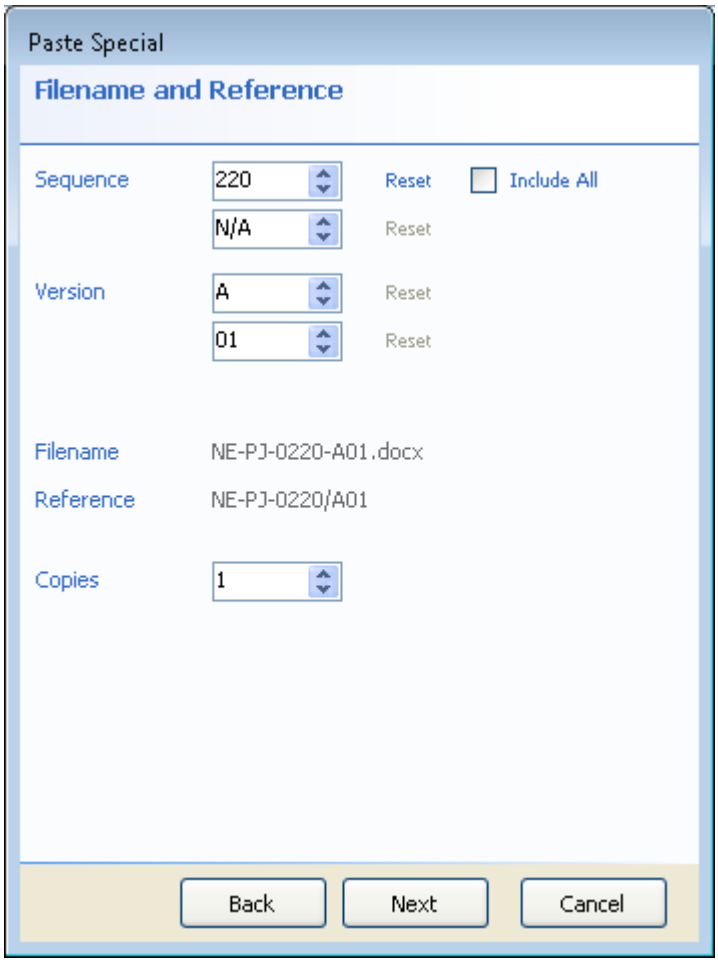


Figure 165

Adjust the sequence or version characters if required, using the up/down controls or by entering characters in place of the existing ones. Click *Reset* to return to the default number.

Tick the *Include All* checkbox to allow the selection of sequence characters that are lower than the next characters in the sequence.

Adjust the *Copies* setting if more than one copy of the document should be pasted into the folder.

Document with a Freetype Name

Right-click and select *Paste* or *Paste Special* from the menu:

- If *Paste* is selected, the document is pasted with its freetype name. If the name already exists in the destination folder, the document is named *Copy of <document name>.*
- If *Paste Special* is selected, the filename and reference of the source document are automatically copied into the text boxes in the Paste Special form. Edit them if required and click Next.

Multiple Documents

Select the documents to be copied from the source folder, right-click and select *Copy* from the menu.

Navigate to the destination folder.

Right-click and select either *Paste* or *Paste Special:*

- If *Paste* is selected, documents are numbered or named in the same way as single documents.
- If *Paste Special* is selected, the documents, with their Types, Intents, Versions and Sequence Rules are listed in the *Paste Special Wizard*.

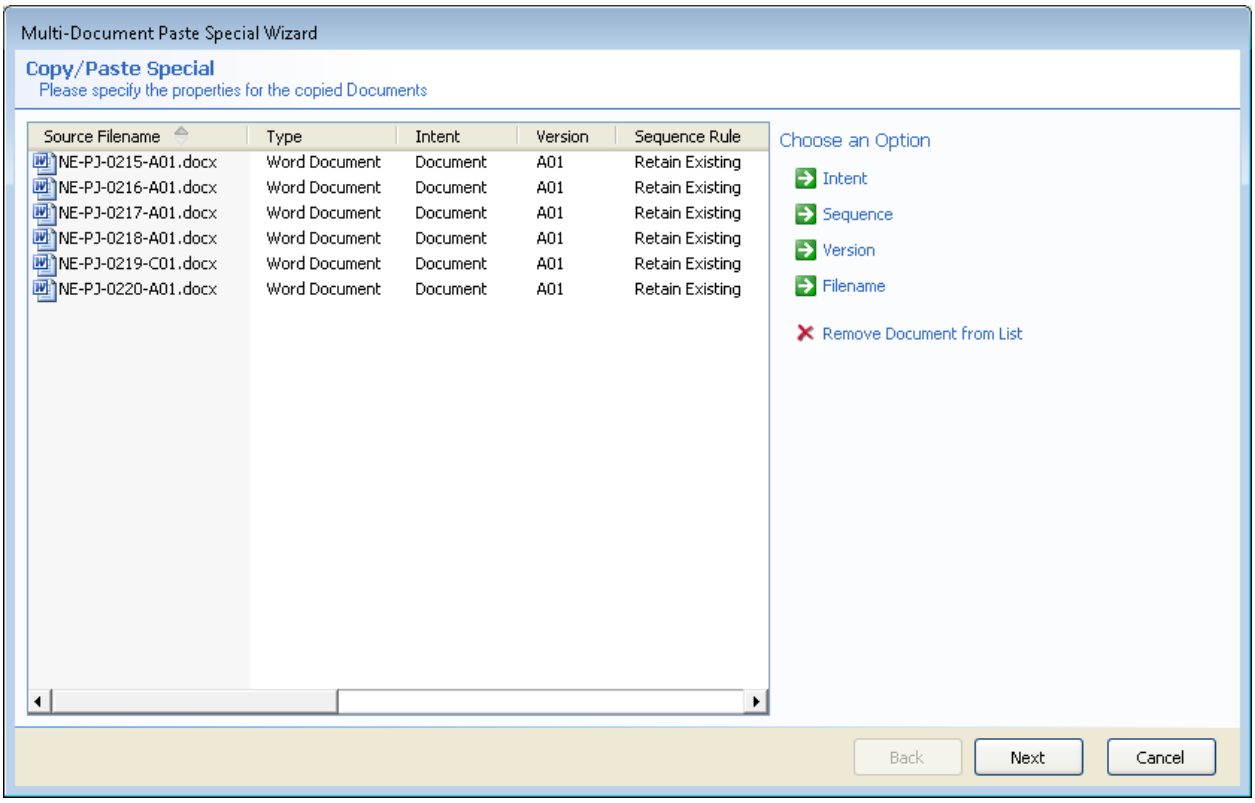


Figure 166

If the *Next* button is clicked, the Final Review page is displayed.

Documents requiring option selections are indicated by yellow exclamation triangles. Unless selections are made for these documents, pasting will not succeed.

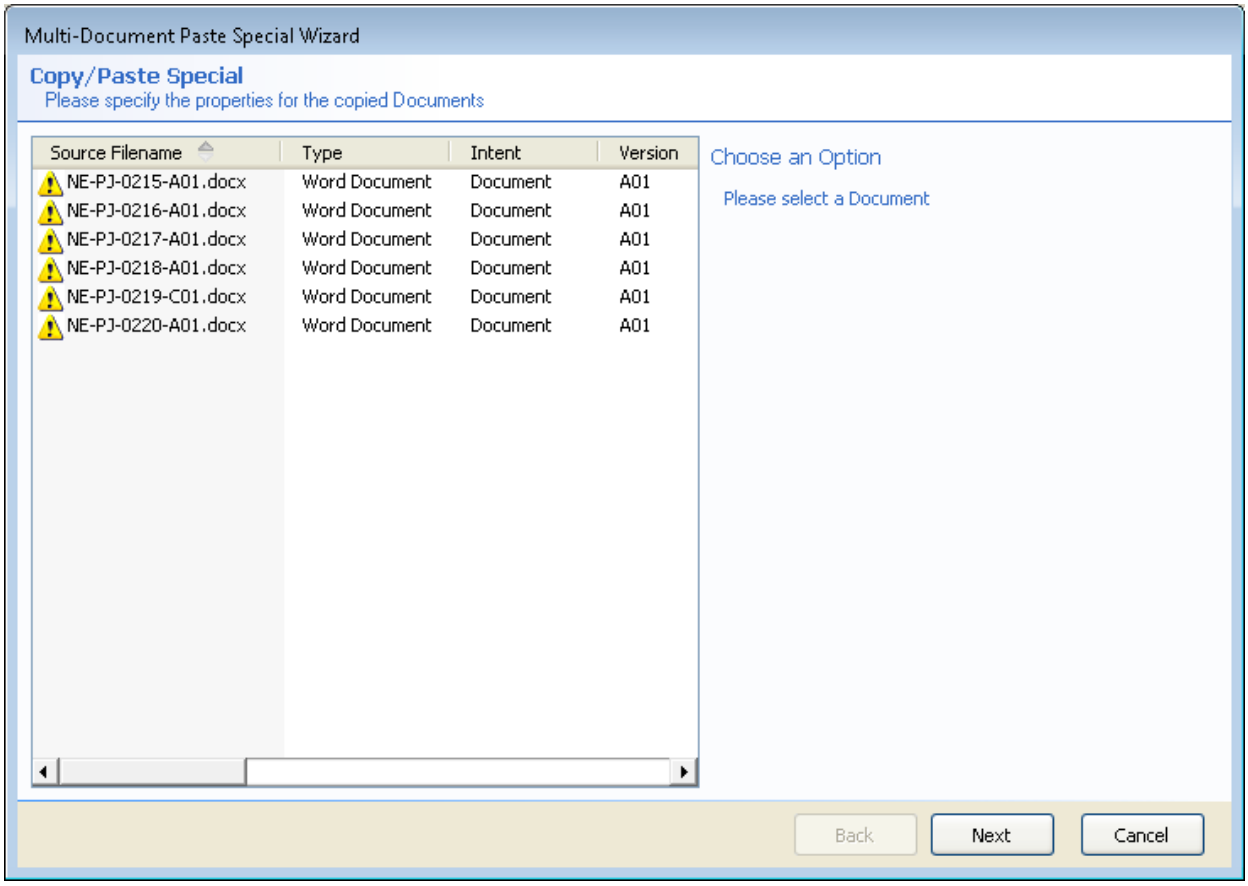


Figure 167

If preferred, documents can be removed from the paste operation by selecting them in the list and clicking *Remove Document from List*. Note that the documents themselves are not deleted.

The status column indicates the corrective action that applies to each document:-

Intent

Select a document or documents of the same type.

Click the *Intent* option to display the *Change Intent* page.

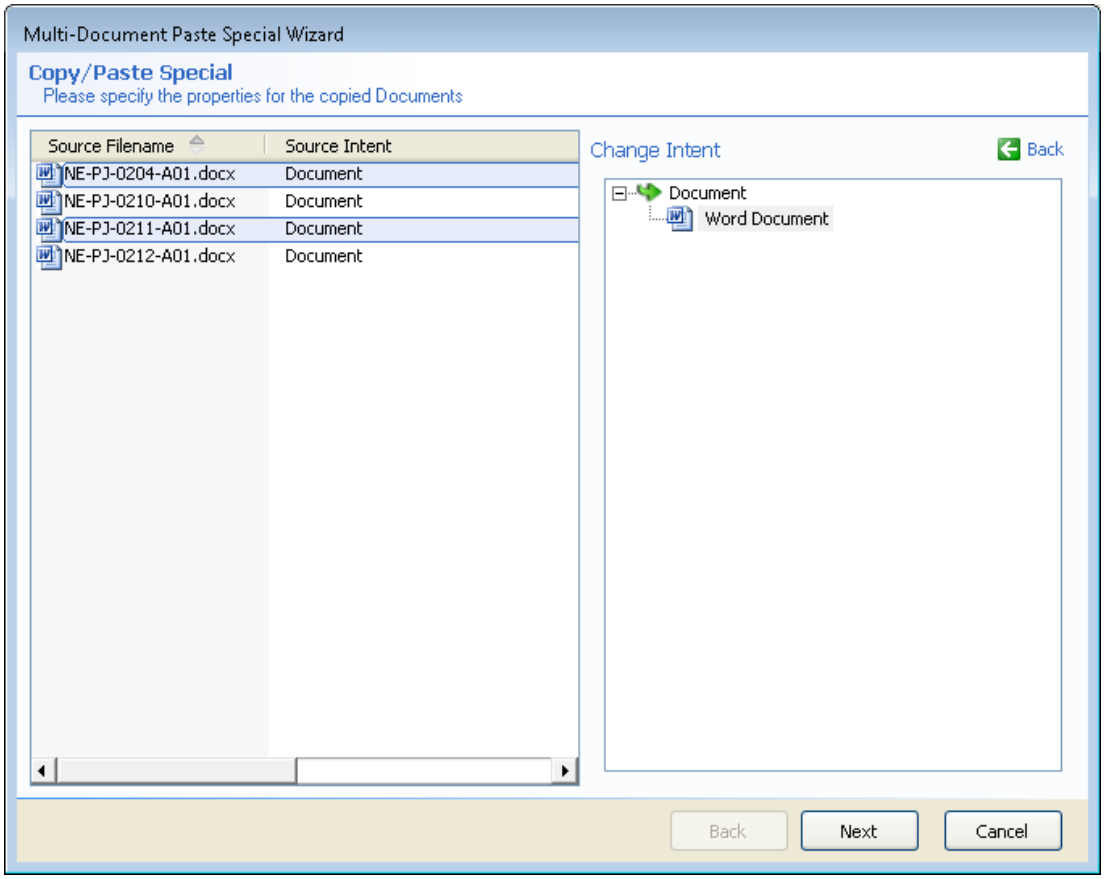


Figure 168

The displayed Intents are those available in the destination folder, for the selected document type.

Select an appropriate *Intent* for the selected documents.

Click the white / green *Back* button to return to the previous page, or click *Next* to continue.

Sequence

Where the document status indicates that the document number already exists, select the documents from the list.

Click *Sequence* to display the *Change Sequence Rule* page.

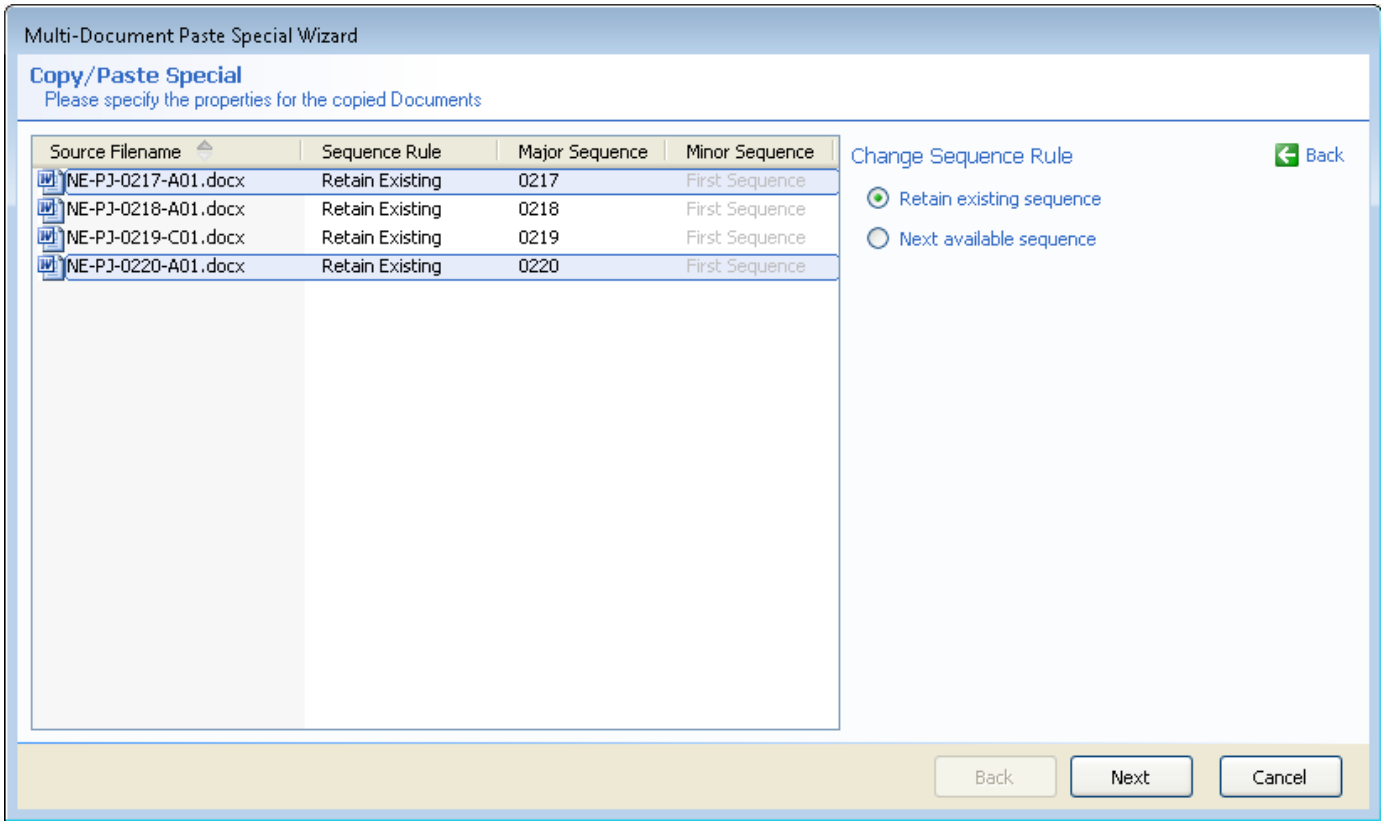


Figure 169

Select *Next Available Sequence* if it is appropriate to do so.

Click the white / green *Back* button to return to the previous page, or click *Next* to continue.

Version

Select documents which require different version characters.

Click the *Version* button to display the *Change Version* page.

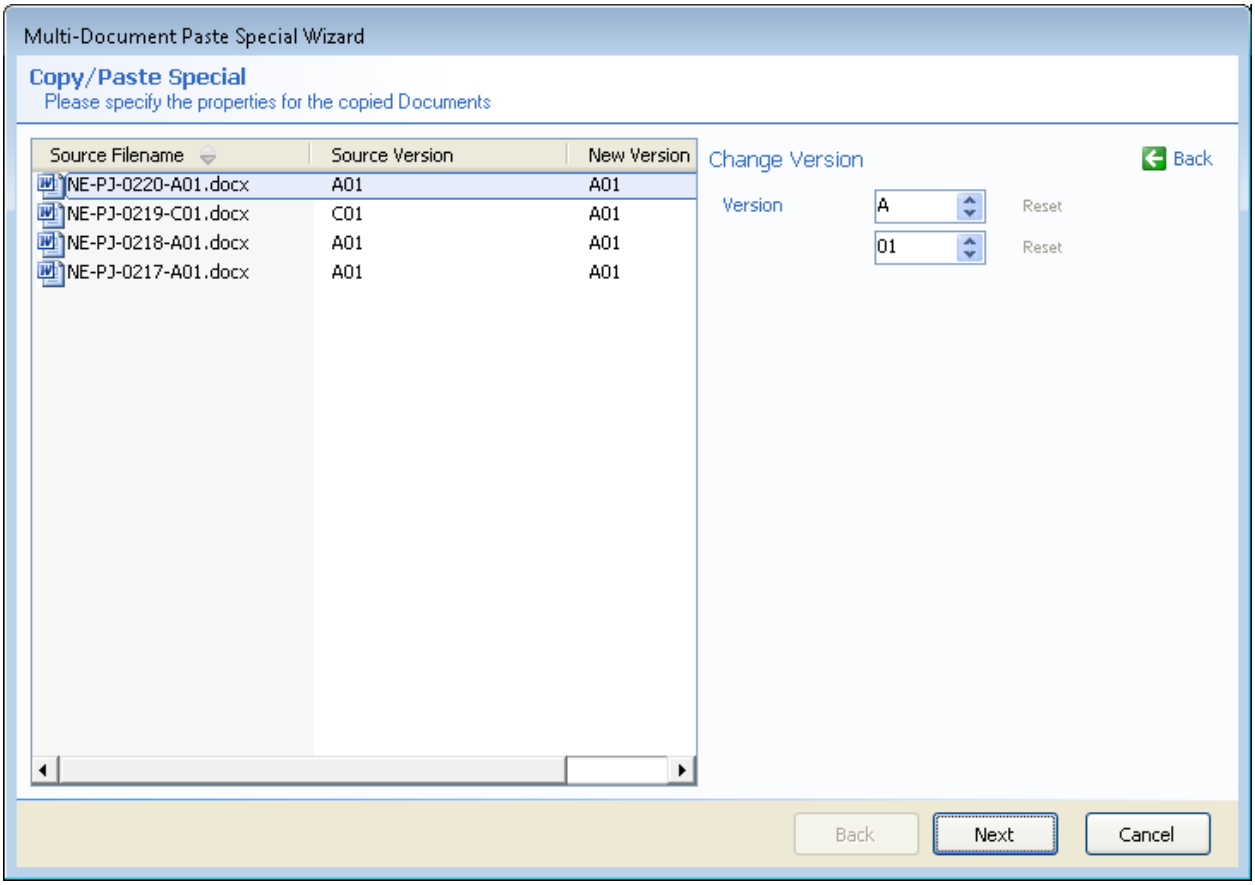


Figure 170

Select documents that require the same version characters and click the Up / Down arrows to set their version as required, or in place of the displayed characters, enter new ones.

If necessary, repeat for other documents requiring different version characters and set their version as required.

Click the white / green *Back* button to return to the previous page, or click *Next* to continue.

Filename

Where the destination folder numbering system is *Freetype*, click *Filename* to display the *Change Filename* page.

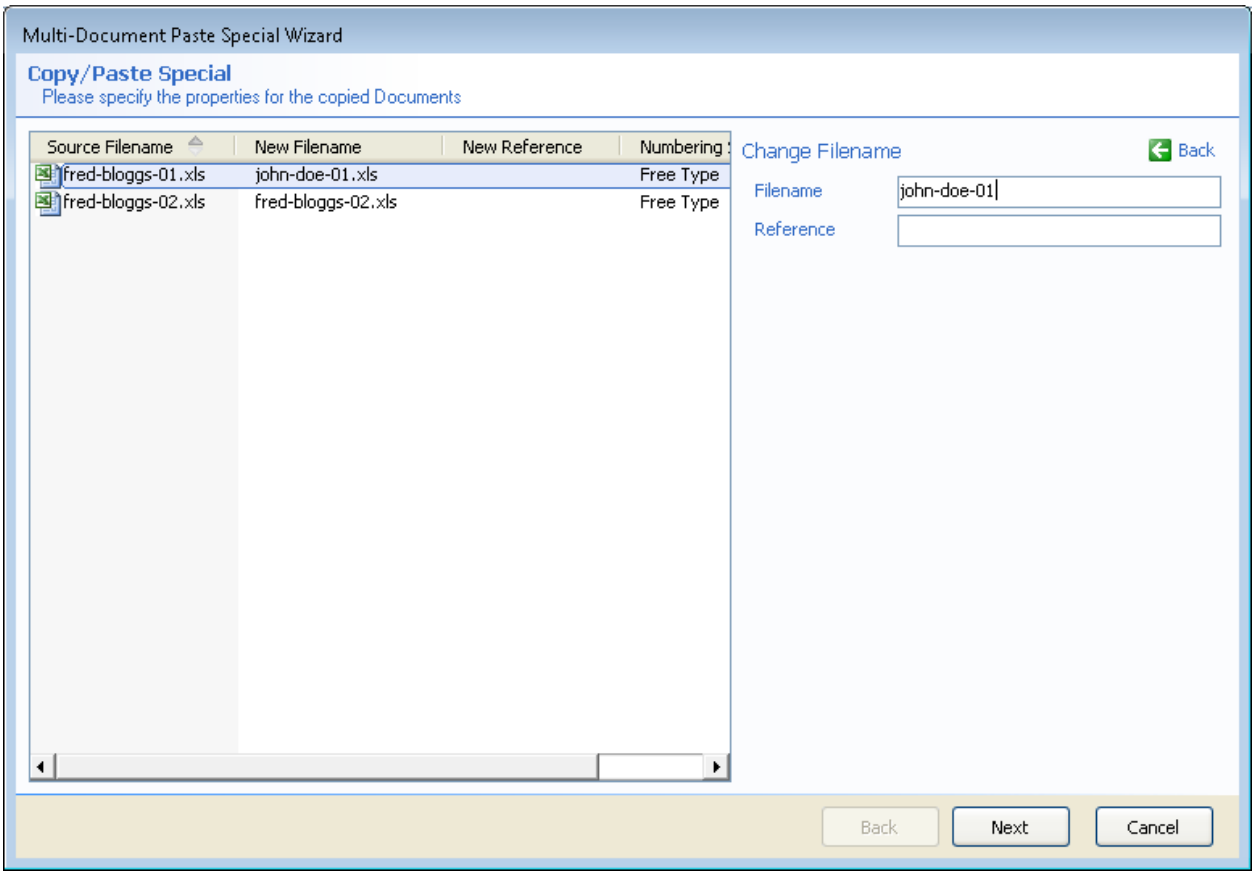


Figure 171

Select one document at a time and enter its *Filename* and *Reference* as required.

When all entries are made, click the white / green *Back* button or click *Next* to continue.

Final Review

The Final Review page indicates whether the paste will succeed or whether other option selections remain to be made.

If ready to proceed, click the Finish button. The progress of the Paste operation is indicated by the Copied and Failed counts.

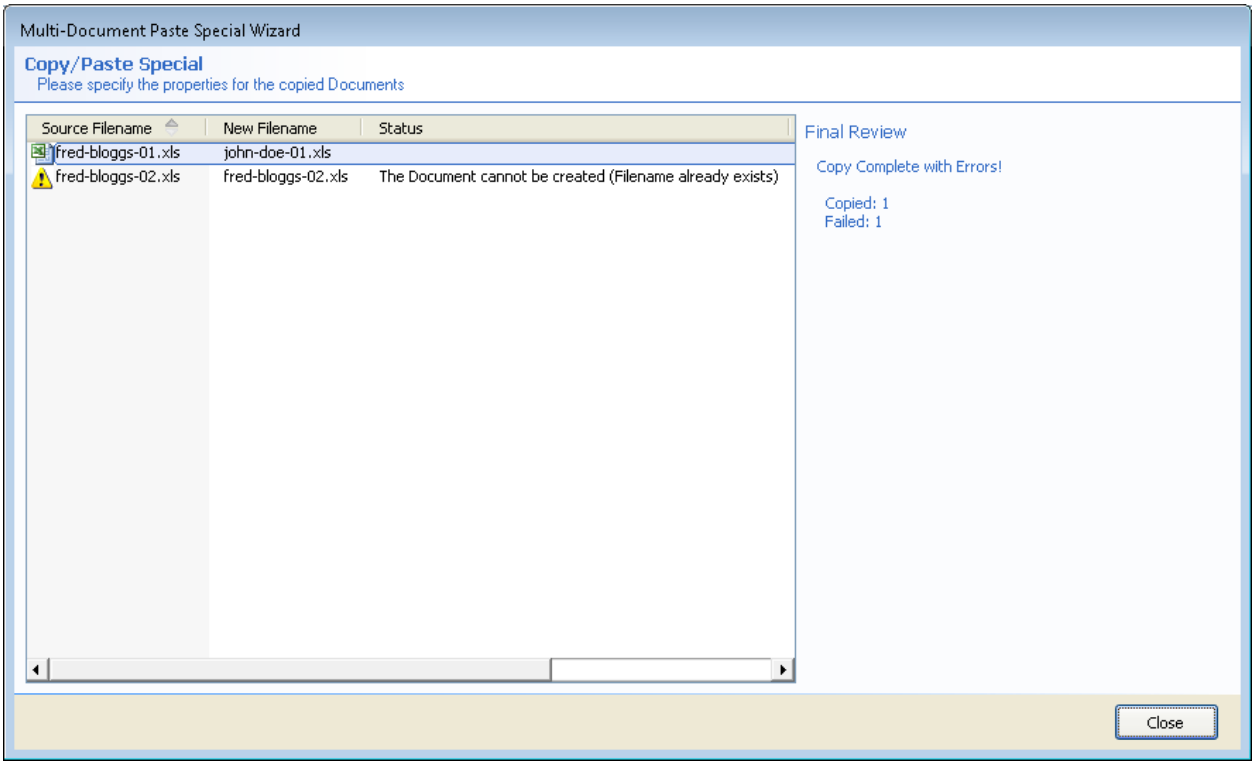


Figure 172

Note:

When using copy / paste special, documents can be created without mandatory keywords. This occurs when the keyword is mandatory for the destination document but not for the source document. Where a mandatory keyword is required, please select the destination document and enter it.

Pasting as a Reference

If you require document(s) to be copied as a Reference to other documents then you will need to follow the process shown below.

Navigate to the document(s) you wish to copy as a reference then right-click on the document(s). From the menu items displayed click on the 'Copy' option.

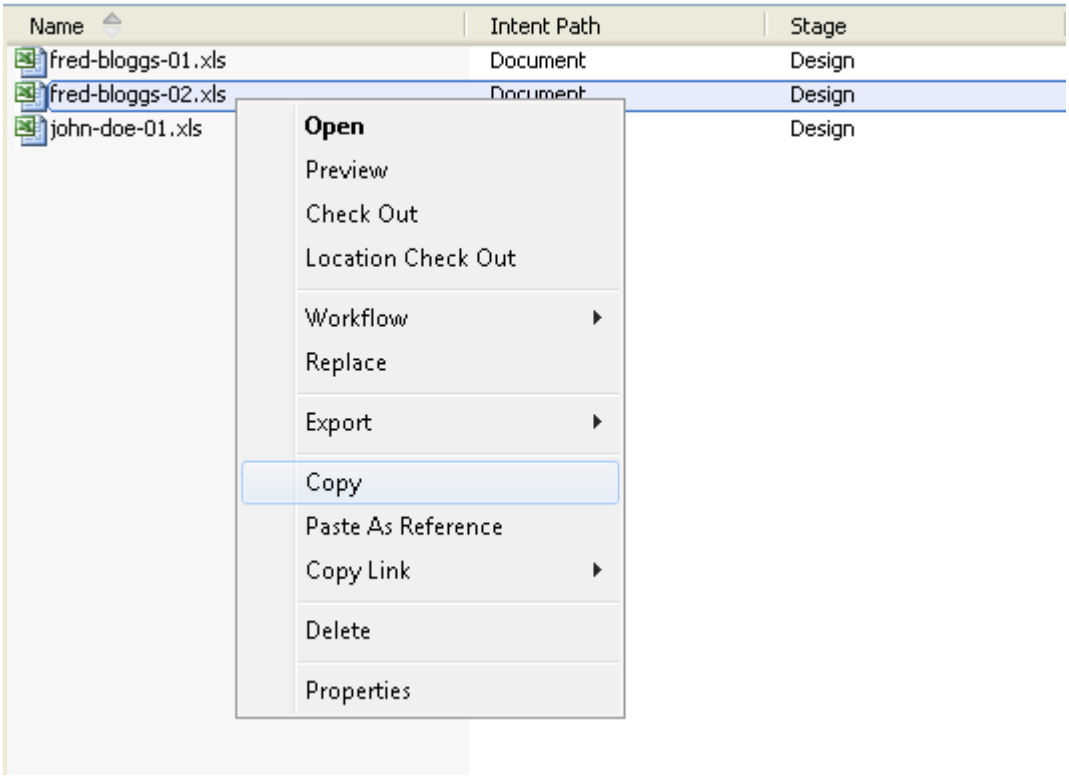


Figure 173

Now right-click on the parent document (i.e the document you want to reference to).

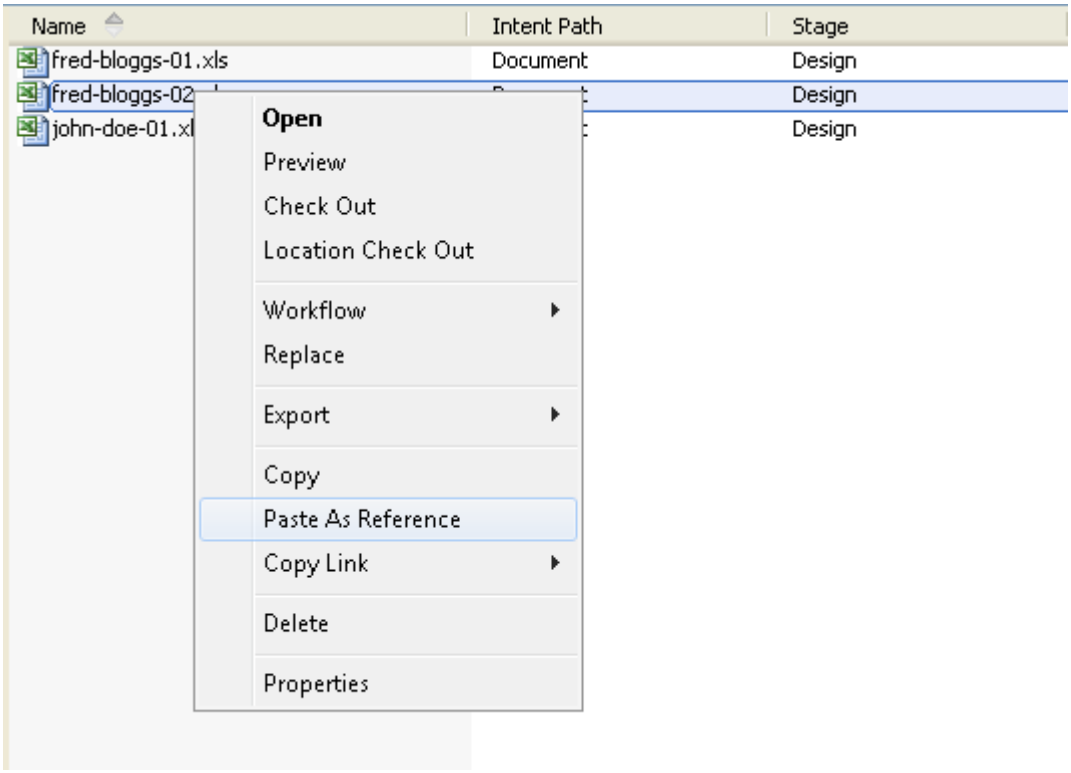


Figure 174

Once you have clicked on the 'Paste As Reference' menu item, the following screen will be displayed.

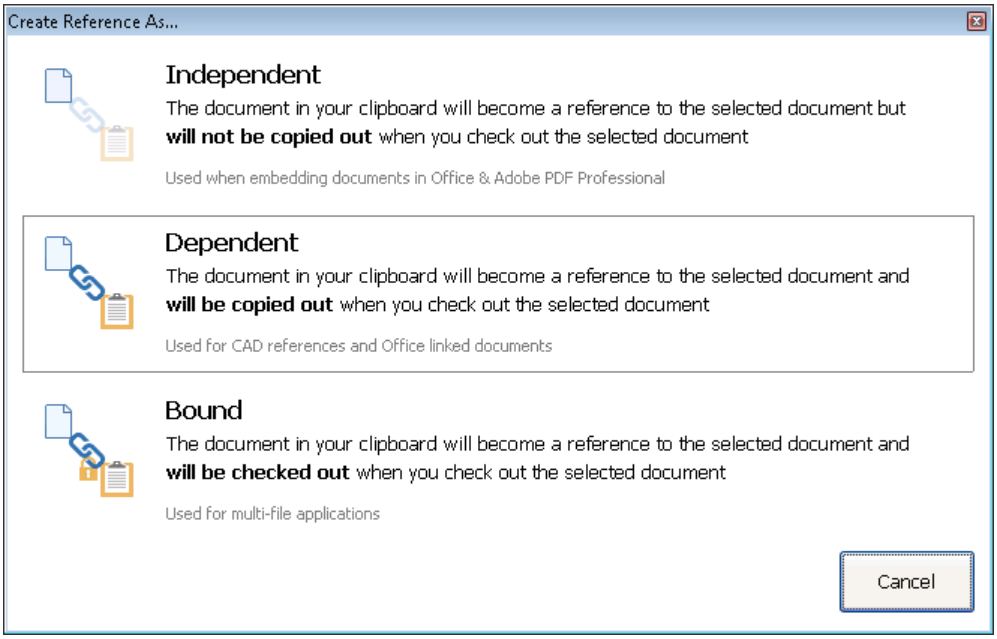

Create Reference As...
Independent
The document in your clipboard will become a reference to the selected document but will not be copied out when you check out the selected document
Used when embedding documents in Office & Adobe PDF Professional
Dependent
The document in your clipboard will become a reference to the selected document and will be copied out when you check out the selected document
Used for CAD references and Office linked documents
Bound
The document in your clipboard will become a reference to the selected document and will be checked out when you check out the selected document
Used for multi-file applications
Cancel

Figure 175

There are three types of references available when a document is created as a reference these are.

Independent Reference

Independent references ***will not be copied*** out when you *Check Out* the selected document.

Dependent Reference

Dependent references ***will be copied out*** when you *Check Out* the selected document.

Bound Reference

Bound references ***will be checked out*** when you Check Out the selected document.

Parent Document

Right-click on the parent document and select the *Properties* option from the menu item, the following screen will be displayed.

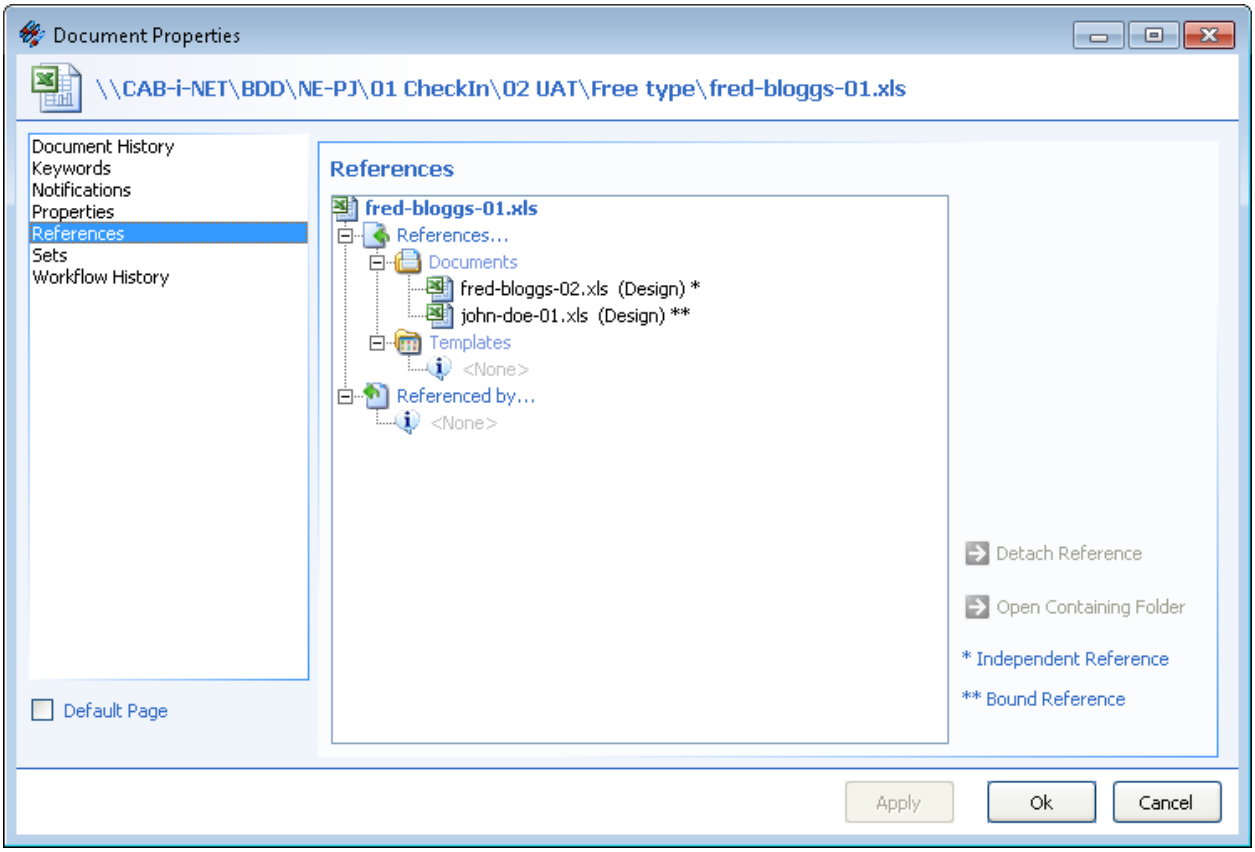


Figure 176

Note:

Any references which are either Independent or Bound Reference will be shown in the references section, in which they are identified by the * astrix next to them.

Copying and Pasting a Previous Version

Select the document whose previous version is required and in its *Document Properties*, select the *Document History* page.

Click on the required previous version in the *Chronological Events* list.

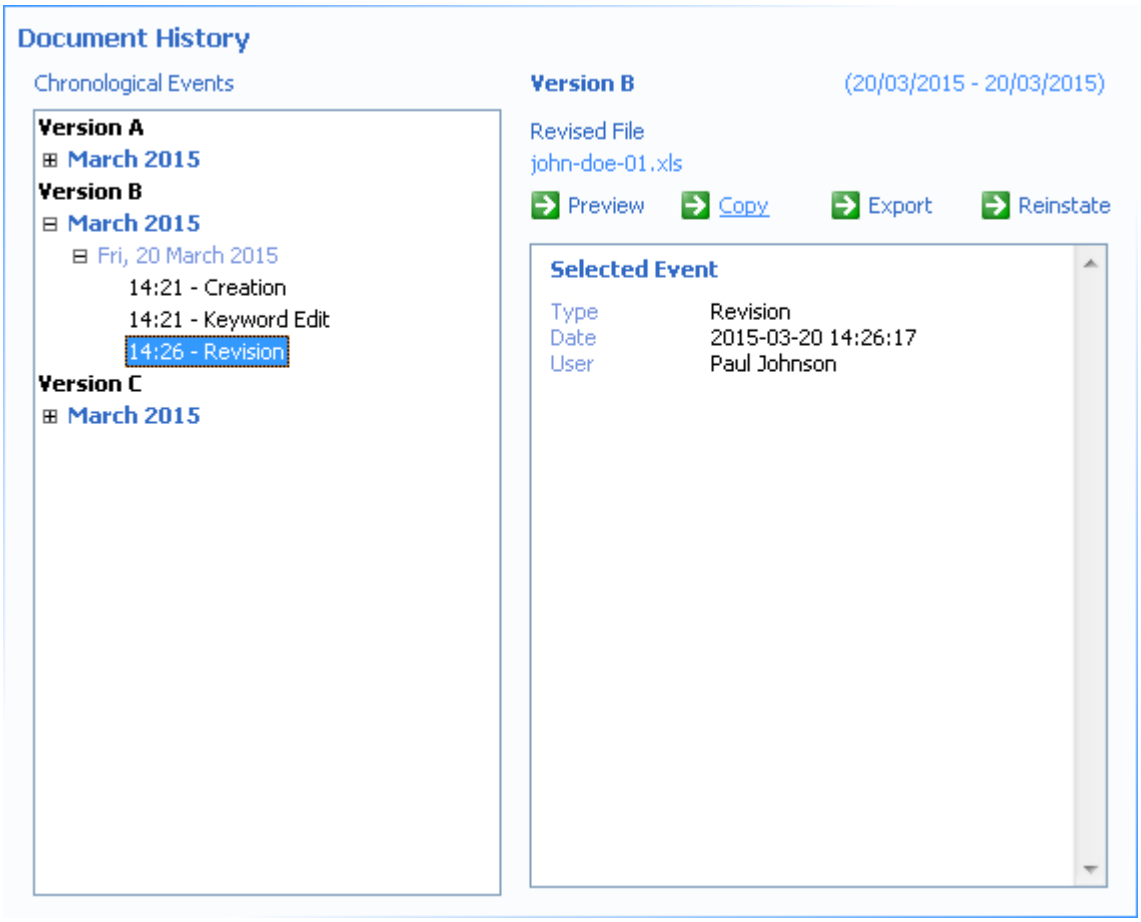


Figure 177

Click *Copy* and close the Document Properties.

The previous version can be pasted either as a new document or as a reference.

Managing Multiple File Applications.

Cabinet Explorer manages multiple-file applications by zipping the root folder prior to Check In, and extracting the managed zip file after Check Out. The same process applies to Location Check In/Out, i.e. Cabinet Explorer document management is in terms of the zip package.

While the package is Location Checked Out, the project files can be updated, potentially by one or more users.

If a *key file** is present, the plug-in will rename it to the name of the zip file and open the document/project into the relevant application. If the extracted document/project already exists or if it is currently in use, a notification message is displayed.

*The key file is a file that would launch the application into that file when it is opened.

The plugin runs during:

- Check In / Check Out
- Location Check In / Check Out
- Open
- Preview

Importing Emails and Attachments from Microsoft Outlook

In Microsoft Outlook, select one or more emails to be imported to Cabinet Explorer.

Click the *Export E-Mail to Cabinet Explorer* button to run the import plug-in.

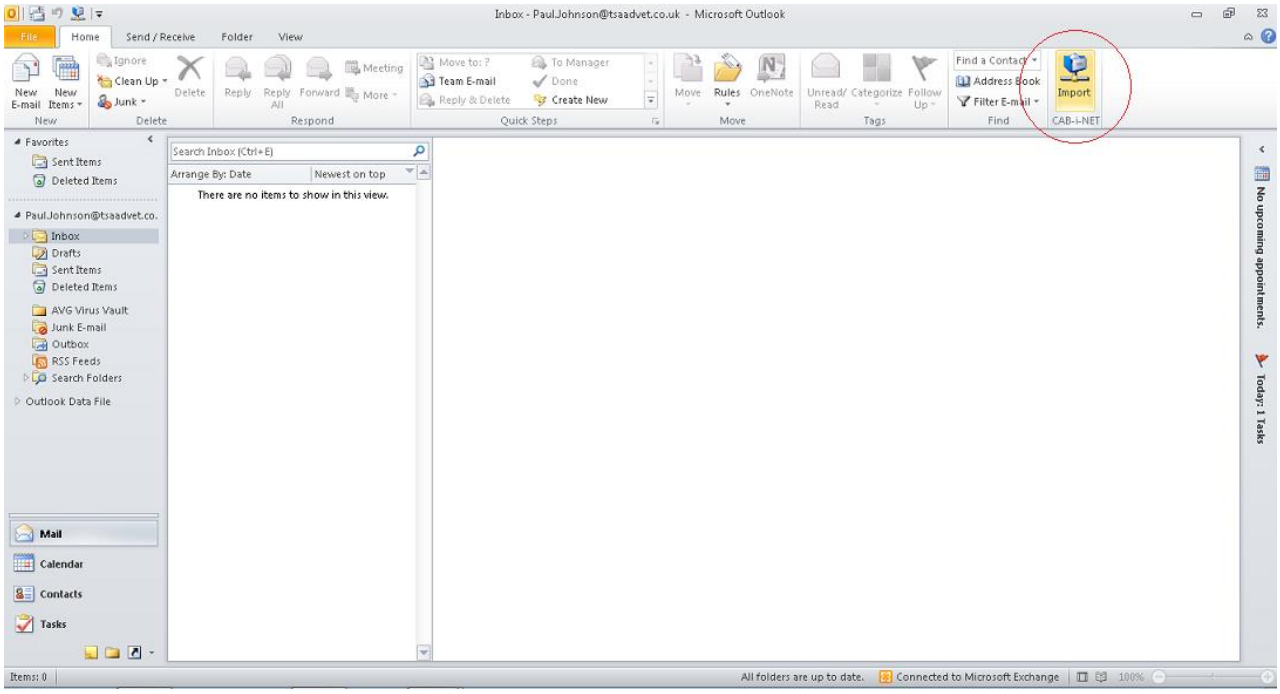


Figure 178

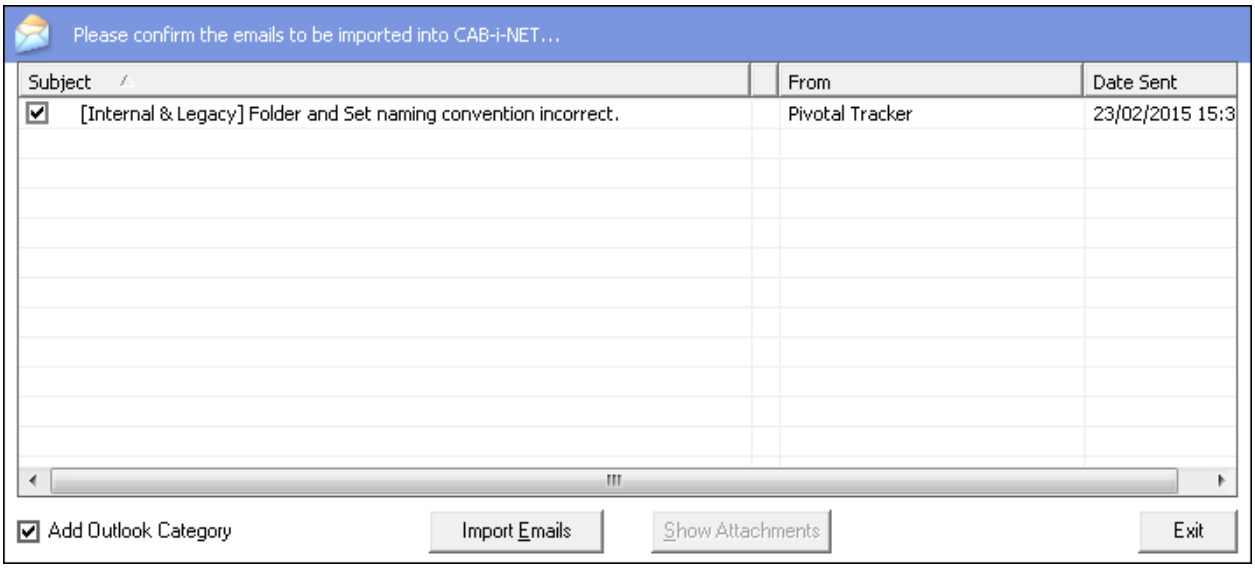


Figure 179

Click *Import Emails.*

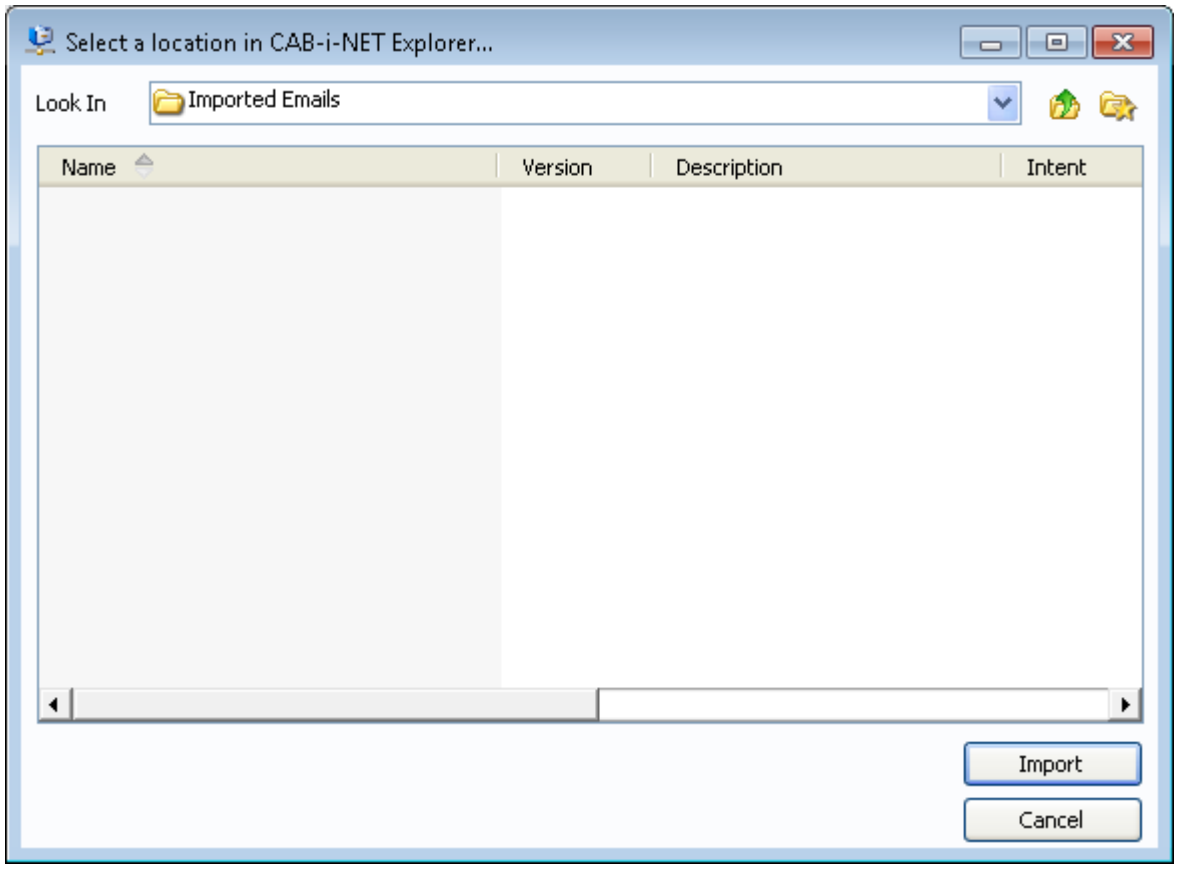


Figure 180

Select the Cabinet Explorer folder to store the emails and click *Import.*

Select an email file type and click *Next.*

Select an appropriate file name or number and click *Next.*

Review the documents in the *Final Confirmation* page.

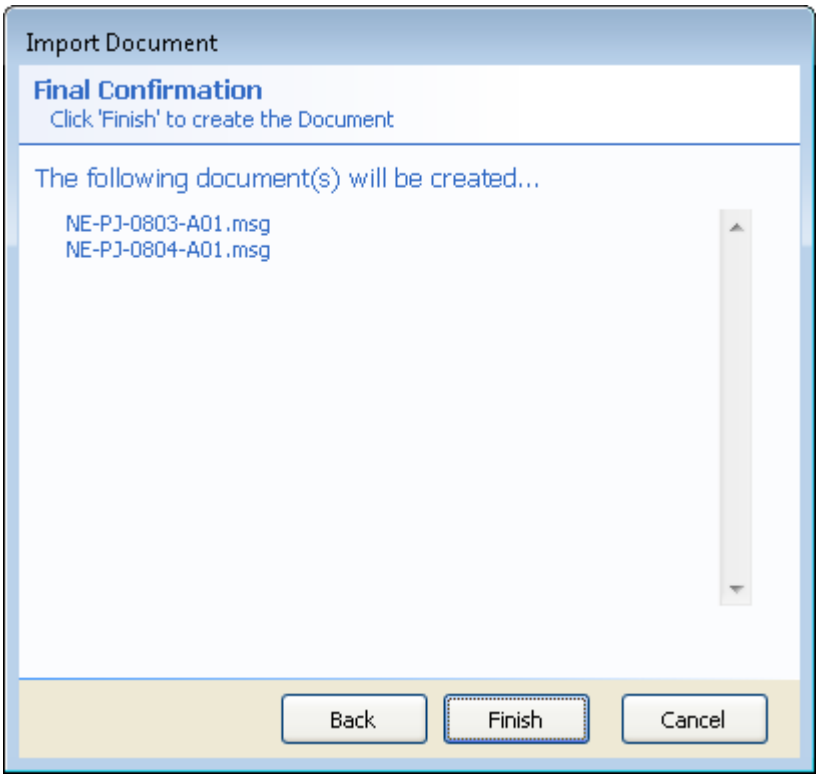


Figure 181

Click *Finish* to complete the import.

Once the Finish button has been clicked, you can see that the imported emails are now shown in the listview (see below).

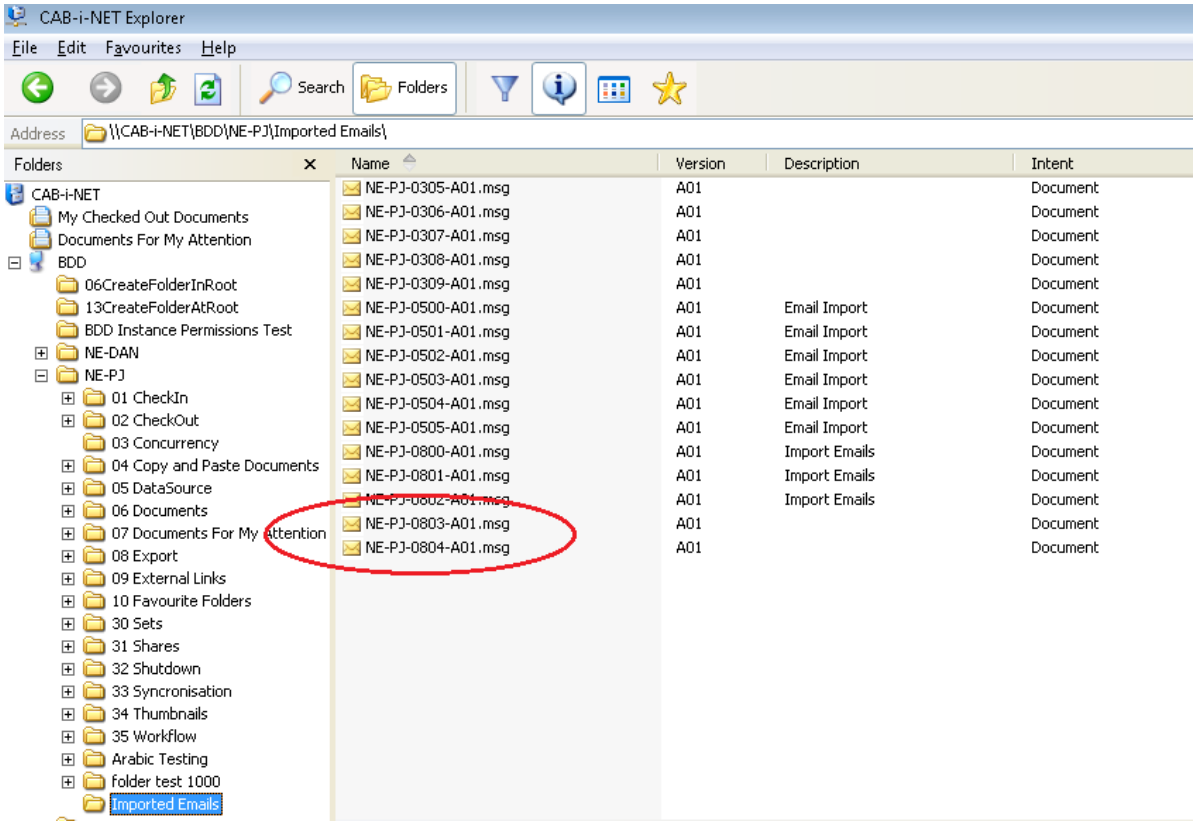


Figure 182

Importing Attachments

To import attachments as individual documents in Cabinet Explorer, click *Show Attachments* instead of *Import Emails* (see figure 179).

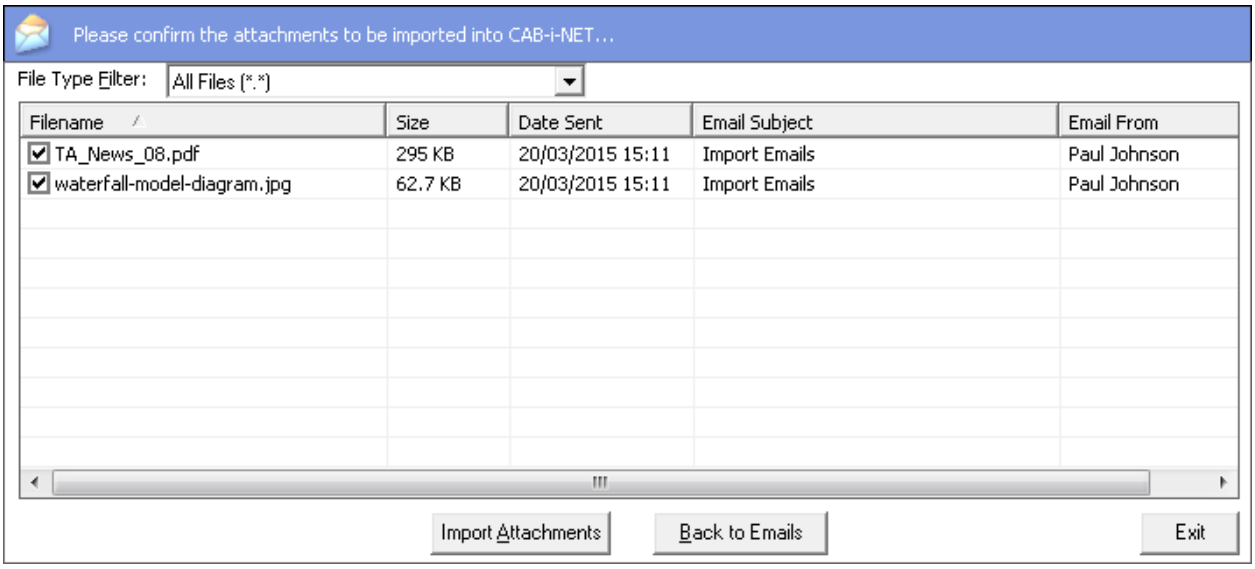


Figure 183

Imports may be performed on attachments with the same file type or multiple file types. If required, select a file type filter in the drop-down list.

- Select the attachments to be imported and click *Import Attachments.*
- Select the required Cabinet Explorer folder and click *Import.*

For details of single or multiple file type imports, please refer to *Importing Documents to a Folder*.

Reference File Integration

Microstation

Bentleys MicroStation provides the ability to attach designs to one another such that they *reference* each other. These attachments are called *Reference File Attachments* and allow an overall design to be constructed from many layers of separate designs.

A useful analogy: reference files are akin to layers of OHP slides overlaid to give an overall picture. Slides can be removed (or their display turned off) at any point.

For an EDMS to integrate successfully with *MicroStation* it needs to be able to handle *Reference file attachments* to ensure that when design files with attachments are opened, the files needed to fulfil the reference attachments are also available.

Cabinet Microstation Reference Functions:

Displays attached Reference Files:

- This functionality allows a user to determine which files are attached to a design file without the need to open the design file in Microstation.

Display files that this file is attached to or referenced by:

- This functionality allows a user to determine which files a design file is referenced by without the need to open the design file with Microstation.

Display Referenced Information when opening a design file with Microstation v8.

- This functionality allows a user to view additional reference file status information where appropriate.

Reference Files resolution at file open & Batch Processing

- Microstation reference file attachments can prove to be of massive benefit in the generation of designs based on common data & complex distributed designs. However, should the linkage between the master design file and reference attachments become broken, they can prove troublesome to fix.

CE provides a “batch” solution to this and other potential reference file attachment problems.

Reference File resolution at Location Checkout & Export.

- CE provides a robust, consistent and recognized approach to reference file attachments which in turn ensures a simple method of exporting design files with their associated reference file attachments. This ensures that their intended recipient can rebuild the structure with minimal configuration; simply setting one variable in MicroStation ensures a seamless exchange of design data from a CE controlled environment to a stand-alone environment.

Technical Overview

To deal with the vagaries of requirements for reference file attachments and the myriad of methods of use, CE employs a Logicalsystem for attachments. The Logical that CE employs is called: “CE: “

In a typical client install, the file open operation of a design file will ensure that Microstation on the workstation resolves the CE: Logical to a directory on the local machine.

The second part of a CE attachment will be a pair of folders to determine the Instance and the Document ID of the design file being attached. Thus an attachment could appear as shown.

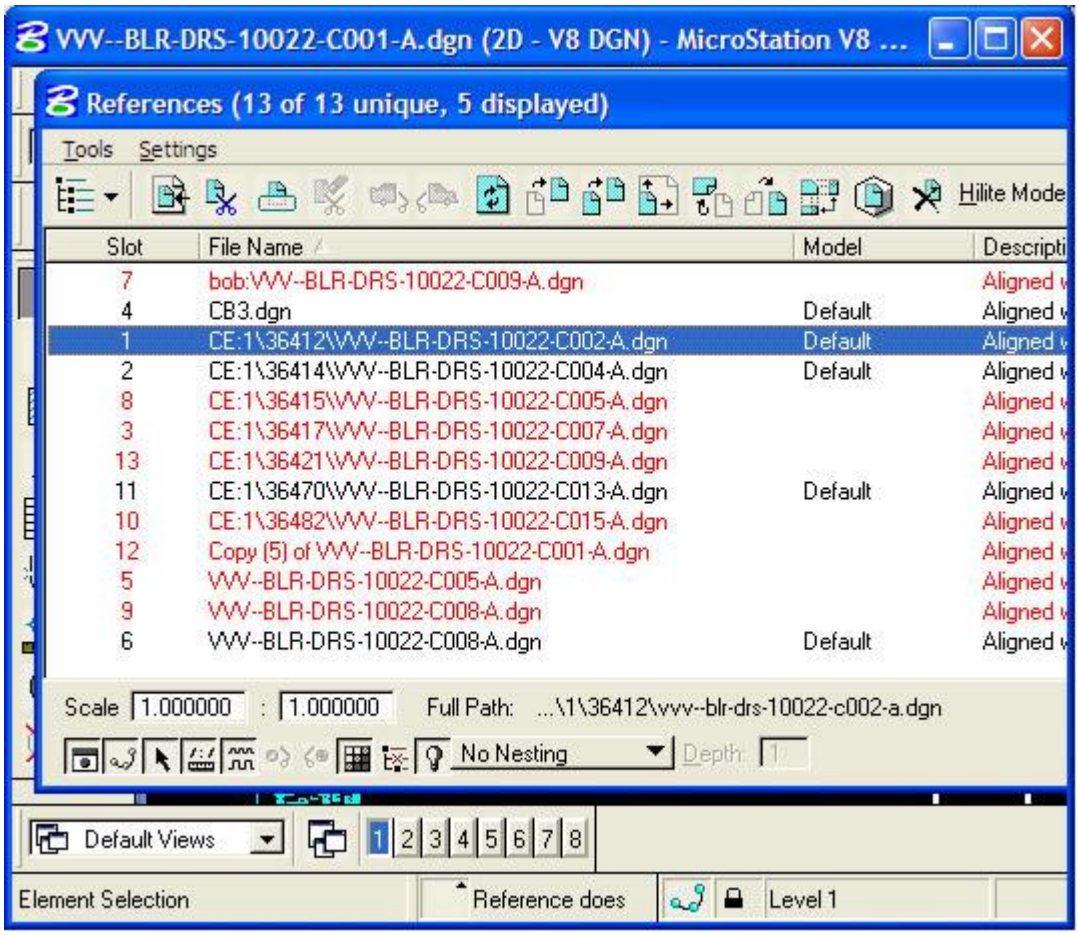


Figure 184

In the highlighted example, the attachment is listed as:

CE:1\36412\WV—BLR-DRS-10022-C002-A.dgn

The next screenshot illustrates how Microstation resolves the logical (CE:) to be C:\Cabinet and the two sub folders of \1 – for the Instance and \36412 – for the document ID of file WV—BLR-DRS-10022-C002-A.dgn

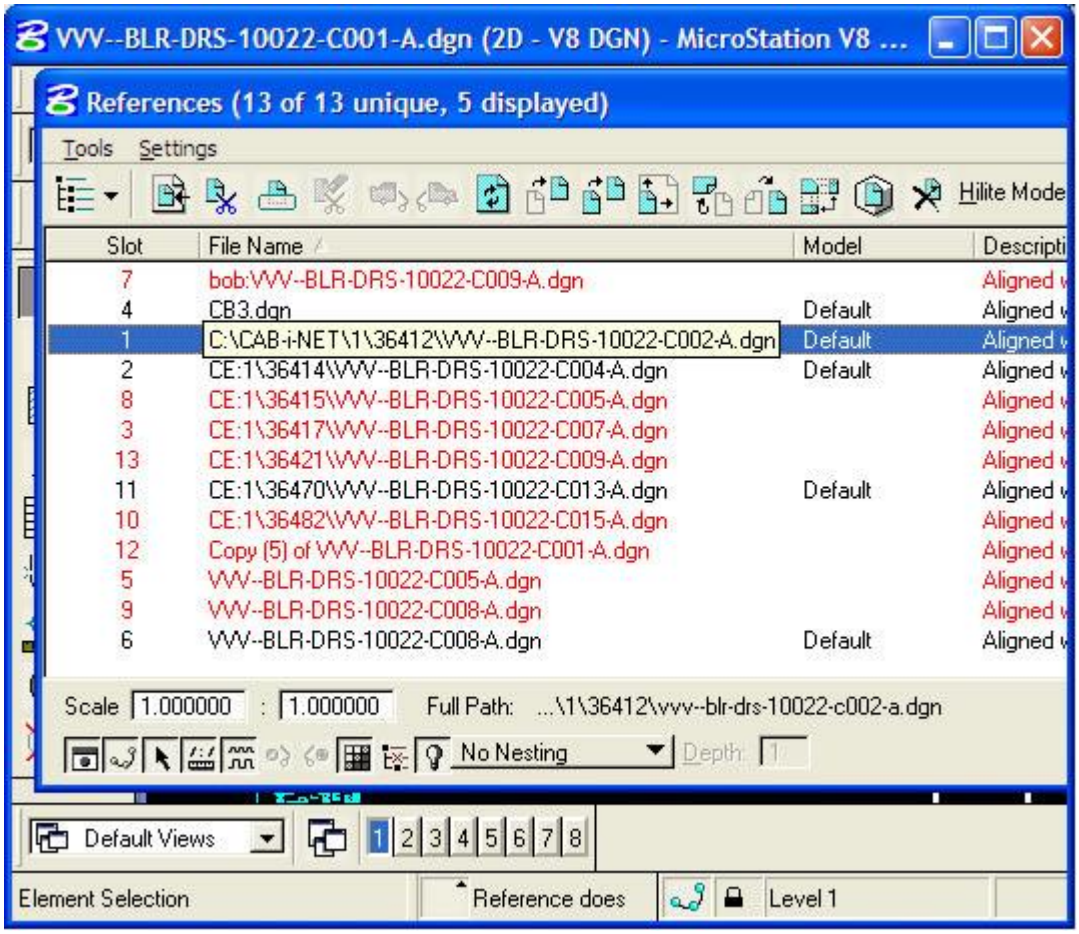

VVV--BLR-DRS-10022-C001-A.dgn (2D - V8 DGN) - MicroStation V8 ...
References (13 of 13 unique, 5 displayed)
Tools Settings
Hilite Mode
Slot File Name Model Descripti
7 bob:VVV--BLR-DRS-10022-C009-A.dgn Aligned
4 CB3.dgn Default Aligned
1 C:\CAB-i-NET\1\36412\VVV--BLR-DRS-10022-C002-A.dgn Default Aligned
2 CE:1\36414\VVV--BLR-DRS-10022-C004-A.dgn Default Aligned
8 CE:1\36415\VVV--BLR-DRS-10022-C005-A.dgn Aligned
3 CE:1\36417\VVV--BLR-DRS-10022-C007-A.dgn Aligned
13 CE:1\36421\VVV--BLR-DRS-10022-C009-A.dgn Aligned
11 CE:1\36470\VVV--BLR-DRS-10022-C013-A.dgn Default Aligned
10 CE:1\36482\VVV--BLR-DRS-10022-C015-A.dgn Aligned
12 Copy (5) of VVV--BLR-DRS-10022-C001-A.dgn Aligned
5 VVV--BLR-DRS-10022-C005-A.dgn Aligned
9 VVV--BLR-DRS-10022-C008-A.dgn Aligned
6 VVV--BLR-DRS-10022-C008-A.dgn Default Aligned
Scale 1.000000 : 1.000000 Full Path: ...\1\36412\vvv--blr-drs-10022-c002-a.dgn
No Nesting Depth: 1
Default Views
1 2 3 4 5 6 7 8
Element Selection
Reference does
Level 1

Figure 185

Reference Information

When using MicroStation v8 to attach references to a drawing, the following alert is displayed.

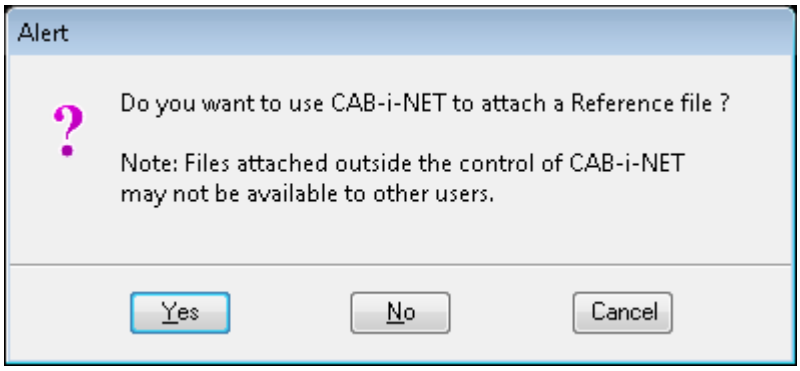

Alert
Do you want to use CAB-i-NET to attach a Reference file ?
Note: Files attached outside the control of CAB-i-NET may not be available to other users.
Yes
No
Cancel

Figure 186

Note:
Multiple attachments may be selected in the Cabinet Explorer *Attach References* form.

If Cabinet Explorer is used to attach a reference file, and the parent drawing is opened in Cabinet Explorer, reference status information may be displayed as shown.

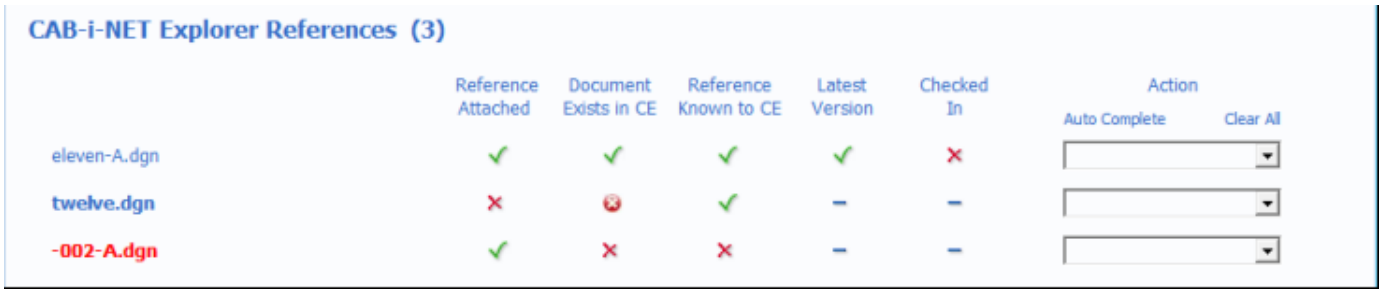


Figure 187

The form is only displayed if it provides additional information. In the example shown, one of the two drawings has been deleted but not purged from the Recycle Bin as shown by the white cross on a red background, in the *Document Exists in CE* column.

Drawings shown in bold have an action or actions available in addition to *No Action Required* and *Detach Reference*, or they have been deleted but not purged.

If there is more than one reference file with the same name and Cabinet Explorer cannot determine which applies, a tick with a plus sign is shown.

Hover over the following items to show further information:

Drawing number	Displays the location of the reference.
Auto Complete	Fill in All blank actions where a default option is available.
Clear All	Blank all actions.
Apply where Applicable	Apply where the action is blank and the option is available.

The columns indicate the following reference states:

Reference Attached	The reference is attached to the parent drawing.
Document Exists in CE	The reference was located and opened within the CE folder structure. If, for example, the reference has been deleted and purged, a cross is shown.
Reference Known to CE	CE has a record that the document is referenced to the parent drawing.
Checked In	The reference is currently checked in.
Latest Version	The reference is the latest version. Note that if, for example, the first version of a drawing is used as a reference, subsequently revised and the first version is reinstated, it is not shown as the latest version. This is because CE treats these events as three distinct versions. A dash indicates that only one version exists.

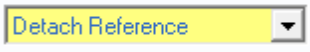
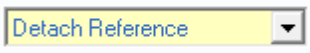
If the drawing includes a reference which was not attached using Cabinet Explorer, external reference information may be displayed as shown.

Reference Resolved	The reference was located and attached in MicroStation.
Document Exists in CE	A cross indicates that the reference is external to the CE folder structure.

The drawing path can be copied out if required, by double-clicking on the drawing number and pasting into the required application.

Drop-down lists are displayed for each reference.

- Click Auto Complete to select actions automatically from the drop-down lists, based on the status information. Note that depending on configuration, Auto Complete actions are selected by default when the form is displayed.
- A yellow highlight in the drop-down lists show that an action will be performed on the reference:

Bright yellow highlight		Action selected automatically.
Light yellow highlight		Action selected manually from the drop-down list.

- Click *Clear All* to cancel all selections if required.

- Select alternative actions in the drop-down lists where necessary. The selected action is displayed above *Apply where Applicable*.

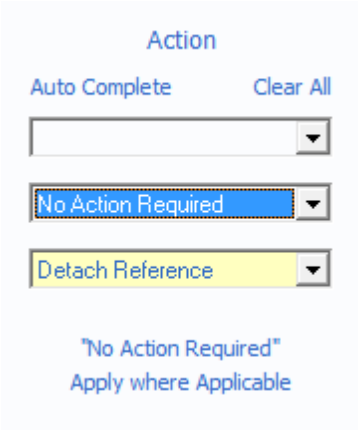


Figure 188

- *Apply where Applicable* is only displayed if there is more than one reference listed and an action is selected.

- Click *Apply where Applicable* if the last selected action is to be applied to all blank drop-down lists.

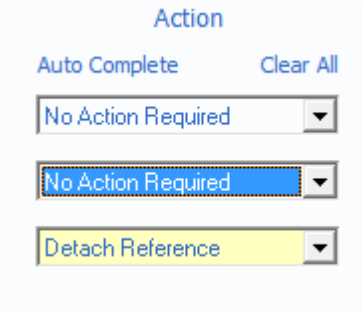


Figure 189

Note however that if, for example, the selected action is *Reattach Reference* and the other references are already attached, the blank drop-down lists remain in that state.

When all action selections are complete, click *OK* to perform these actions and close the *Reference Manager*.

Attaching References in Cabinet Explorer

Open the document to which the reference document should be attached and place the cursor at an appropriate position.

If the document is an Excel workbook and it is edited, Save the changes before attaching the reference.

Microstation and AutoCAD

Right-click on the Cabinet Explorer icon in the System Tray and select *Attach Reference*.
Select the appropriate application and options if applicable from the menu.

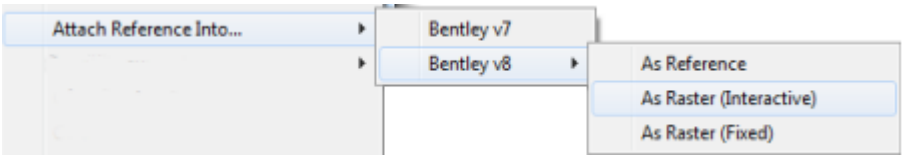


Figure 190

In the *Attach File* form, select the required document and click the *Attach* button.

Either navigate the folder tree or, if favourite folders have been set up, click the *Favourites* button (shown highlighted below) to select folders from the list.

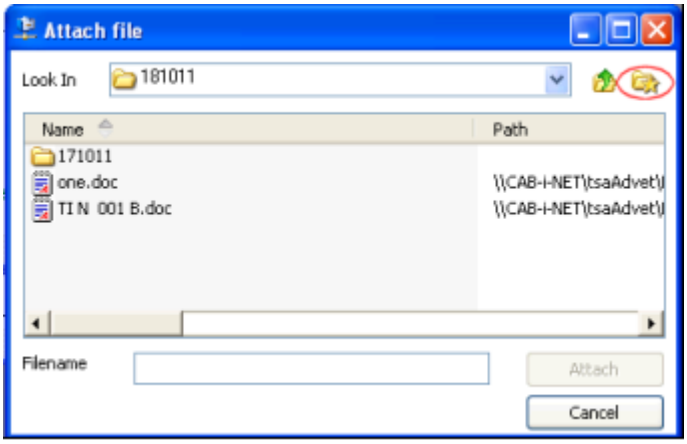


Figure 191

The document is added at the cursor position. Save the changes made to the document.

Word, Excel and PowerPoint

Right-click on the Cabinet Explorer icon in the System Tray and select *Insert Document* and select the opened document type from the sub-menu.

- To insert a picture, select the file (.jpg etc) from the *Attach File* form, click *Attach* and at the next prompt, select *Insert Picture*.

- To insert a linked object, select the file, click *Attach* and at the next prompt, select *Link Object.*

Viewing Document References

Cabinet Explorer can display a list of files that are referenced by a document.

- Right click the document and select *Properties.*
- Select *References* at the left of the form.

The documents that are attached to this document are listed, with their workflow stage or revision state.

Documents shown in blue text are currently checked out.

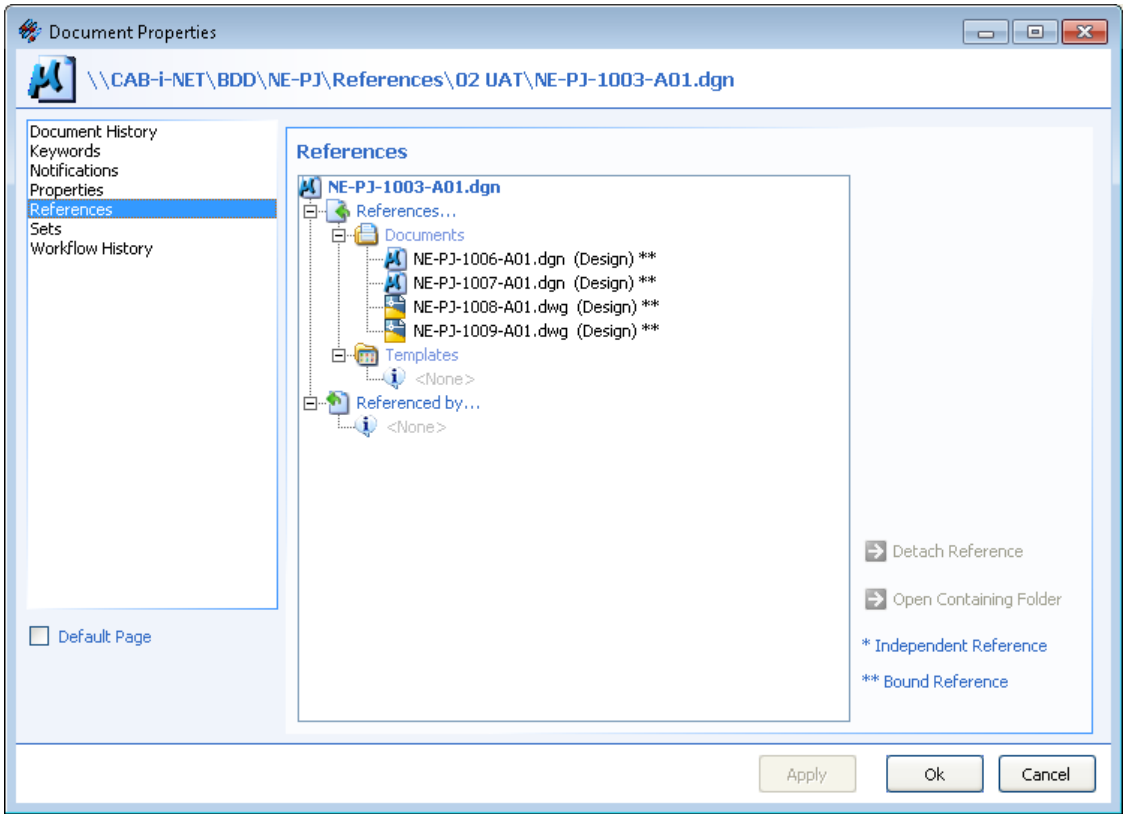


Figure 192

Viewing Files a Document is Referenced by

Cabinet Explorer can display a list of files that a document is referenced by.

- Right click the document and select *Properties.*
- Select *References* at the left of the form.

The documents that the selected document is referenced by are listed, with their workflow stage or revision state. File names shown in blue text are currently checked out.

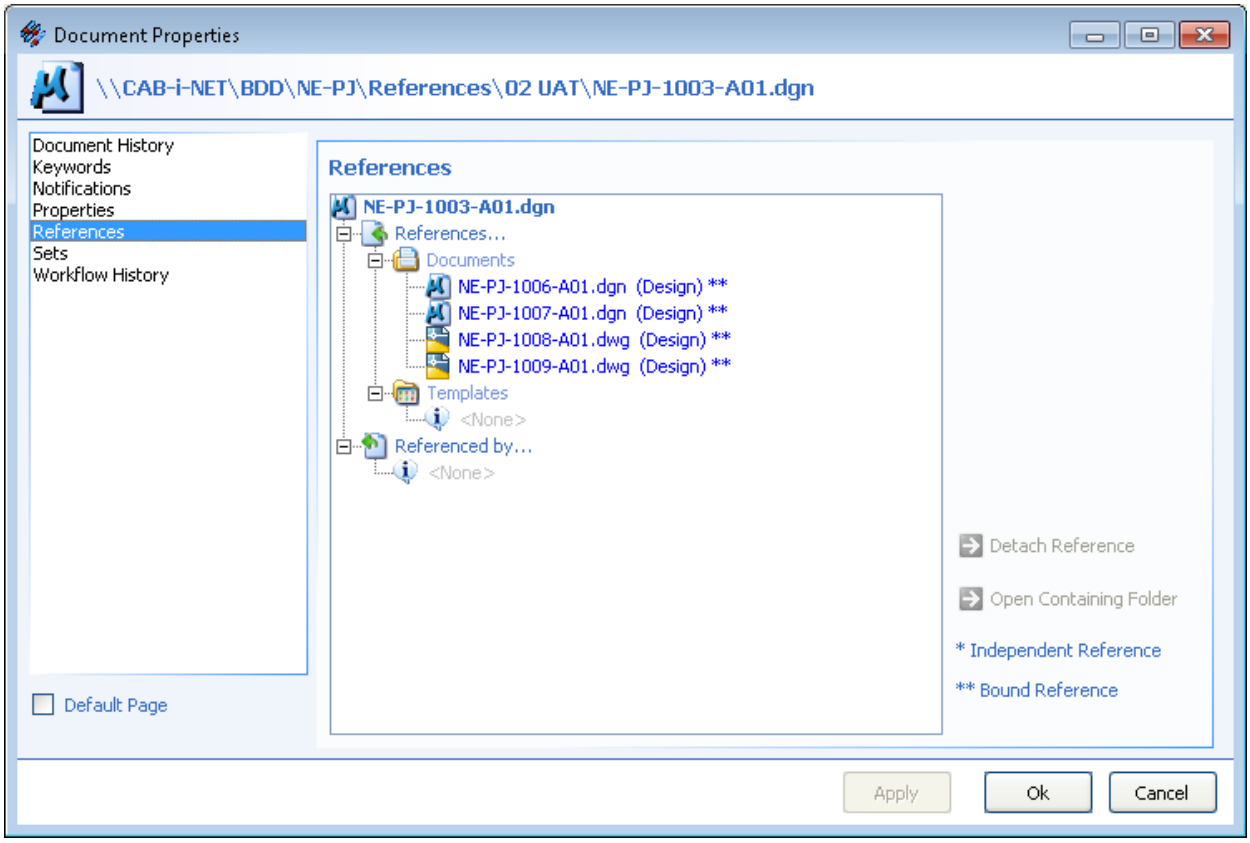


Figure 193

Reference Files and Export, Check Out & Location Checkout

Export

When files are exported from CE, their respective reference file attachments are also exported from the system.

The design files used for Reference file attachments are placed in a sub-directory of the export folder; i.e. if the master design file is exported to c:\temp, the references for that file will be placed in a sub-directory called *References* (see below).

The *References* sub-folder will have sub-directories within it, to allow for the standard CE attachment paths of \Instance\DocumentID\.

To use the master design file in a non-CE configured Microstation environment, simply set a variable within Microstation with a name of CE and a value set to the folder where the exported master design file is located; in this example it would be c:\temp\.

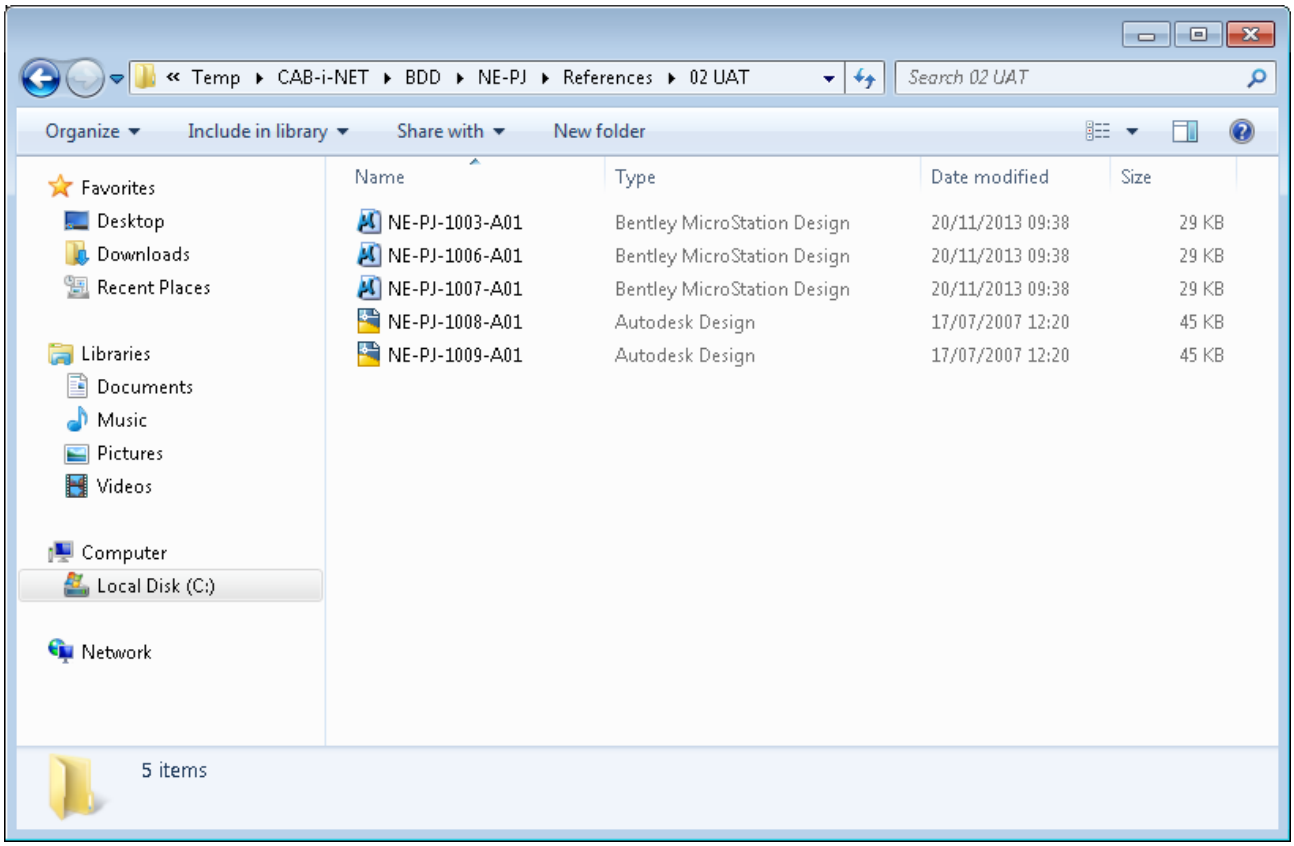


Figure 194

Check Out and Location Check Out

When documents with references are *Checked Out* or *Location Checked Out*, a message may be displayed as shown below, depending on user preference configuration.

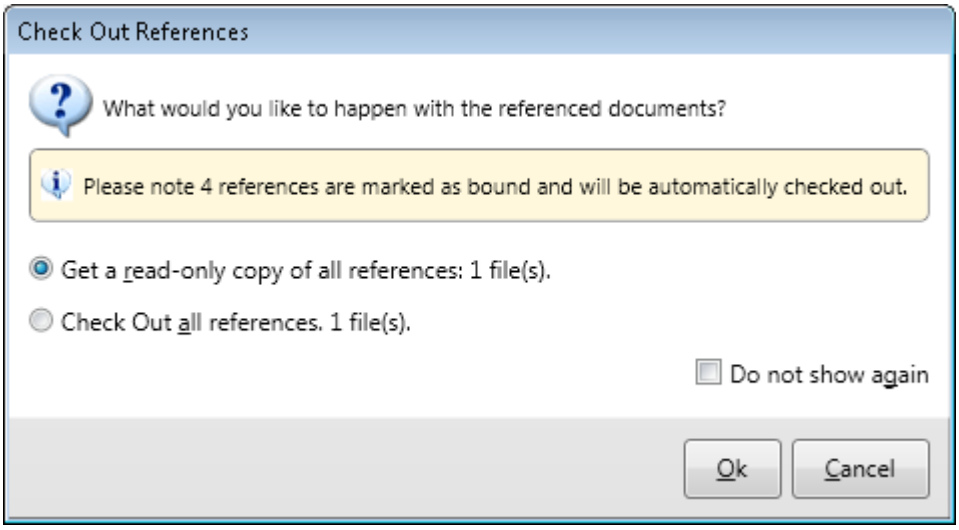

Check Out References
What would you like to happen with the referenced documents?
Please note 4 references are marked as bound and will be automatically checked out.
Get a read-only copy of all references: 1 file(s).
Check Out all references. 1 file(s).
Do not show again
Ok
Cancel

Figure 195

The options shown depend on whether the document has nested references.
If *Do not show again* is ticked, the user no longer sees the message, including when Cabinet Explorer is restarted.

To re-display the message, select Edit > User Preferences and edit the required options.

Check Out

Click the required button. References are either copied out as read-only documents or checked out to the user's Check Out Path ((default C:\Cabinet)\Instance\DocumentID).

Location Check out

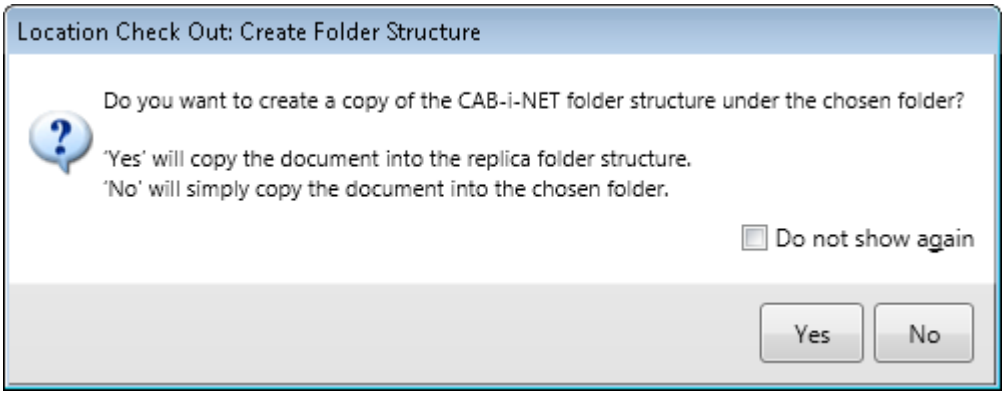

Location Check Out: Create Folder Structure
Do you want to create a copy of the CAB-i-NET folder structure under the chosen folder?
'Yes' will copy the document into the replica folder structure.
'No' will simply copy the document into the chosen folder.
Do not show again
Yes
No

Figure 196

If *Yes*(create folder structure) is selected, *Location Check Out* creates a local copy of the folder structure and copies the selected document and its references into it.

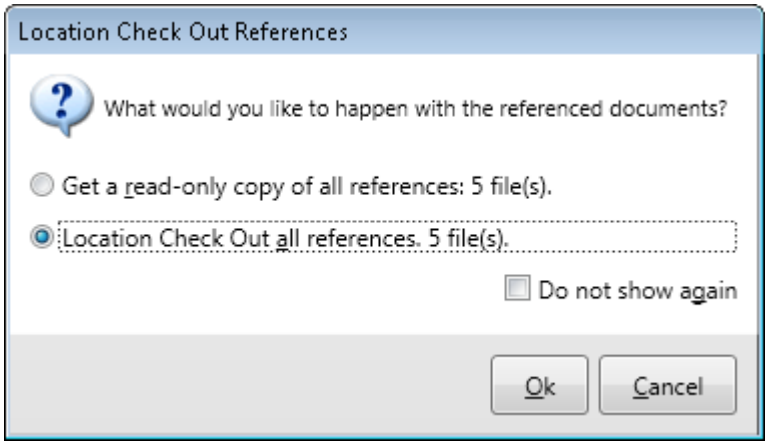

Location Check Out References
What would you like to happen with the referenced documents?
Get a read-only copy of all references: 5 file(s).
Location Check Out all references. 5 file(s).
Do not show again
Ok
Cancel

Figure 197

Select the required option for references, if applicable.

Note: *Check Out* and *Location Check Out* cannot be performed on the reference document if.

- The user does not have the List Contents and Modify Document permissions in the folder that holds the reference document.

Or

- The folder holding the reference document or one of its parent folders is *Hidden,* and the user does not have the *View Hidden Folders* privilege.

In both cases, a warning is displayed in the Information pane, and a copy of the reference document is copied to a *References* folder structure in the *Check Out* or *Location Check Out* folder location.

Batch Reference Files Resolution

CE allows for the ability to mass Import design files into the system. If these imported files reference each other, CE needs to resolve the attachments once they (the designfiles) are imported into the system.

This can be performed from the interface without requiring Microstation on the workstation, as the Workflow Publisher can be employed to do the job through a specific Workflow, therefore automating the process.

Reference File Dependency Update

When attachments are removed from files and the master file is closed, if the *close* event of the application in question is captured and CE is invoked, CE will remove the attachments from its records. This ensures that CE's ability to display *References* and *Referenced By* is accurate, i.e. it does not display attachments that are no longer required.

CE will also advise a user when opening a file if it is being referenced in other files.

Adobe Acrobat Professional Plug-in

This section guides you through the functionality of the Adobe PDF Pro plug-in for Cabinet Explorer.

The PDF plug-in has the following function.

Insert Page from another File	This allows you to insert any file from within the Cabinet Explorer System into a PDF document.
Replace	This allows you to replace and existing page with another file or document.

It is assumed that Adobe PDF Pro has been installed and is fully working, and that Cabinet Explorer is up and running.

Open / Open With

Navigate to the PDF file you wish to use in Cabinet, once navigated to the file you wish to open right-click on the file.

Then navigate to the following menu item.

Open - If Adobe Acrobat Professional is set as your default application for PDF's then the Open With menu item will not shown.

If Adobe Acrobat Professional is not set as your default application for PDF's then the Open With menu item will be available.

Open With > Adobe Acrobat Professional.

The Open With option:-

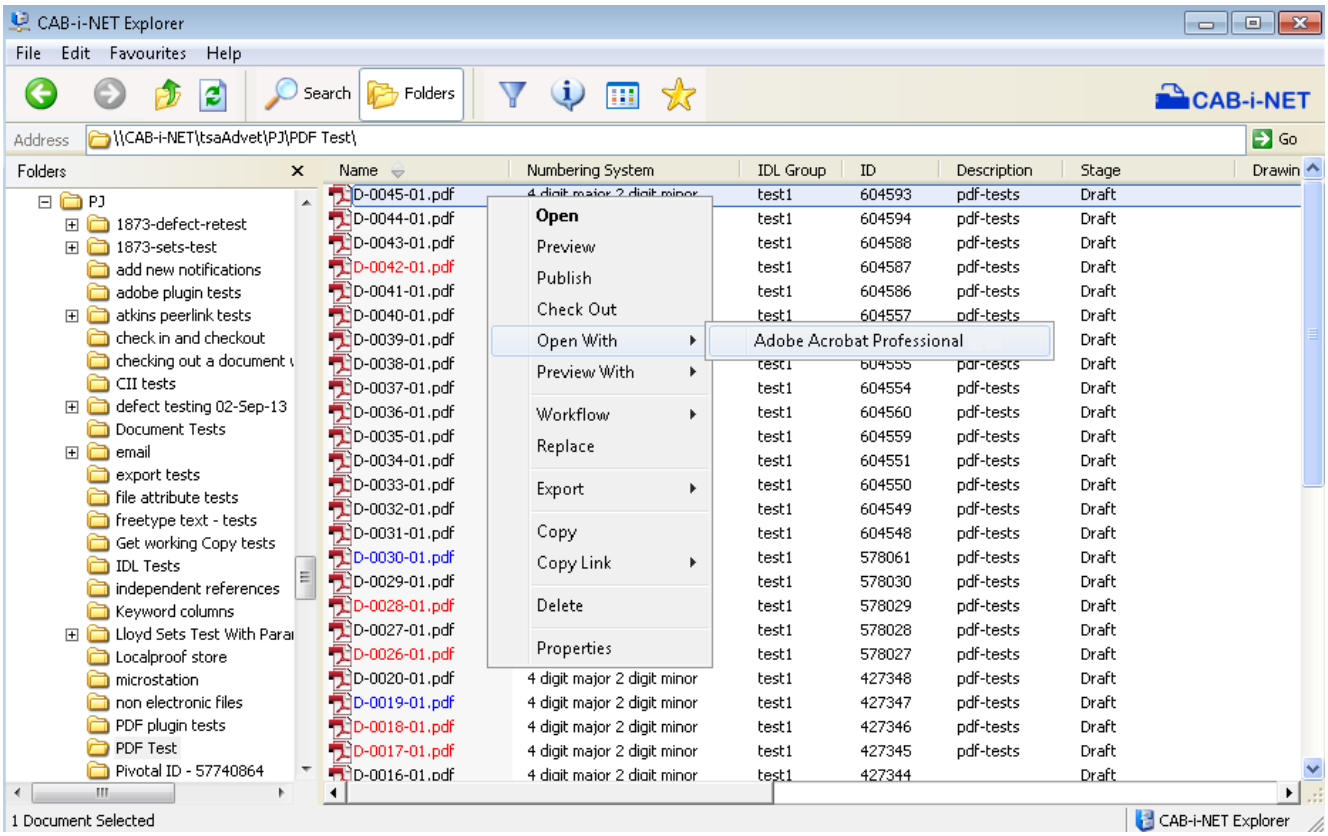


Figure 198

Click on the file which has been selected, Adobe Acrobat Pro launches automatically and displays the file (see image below).

NB: However if you are presented with a Cabinet Login window you will be required to enter a Username, and Password (see below).

Opening the File.

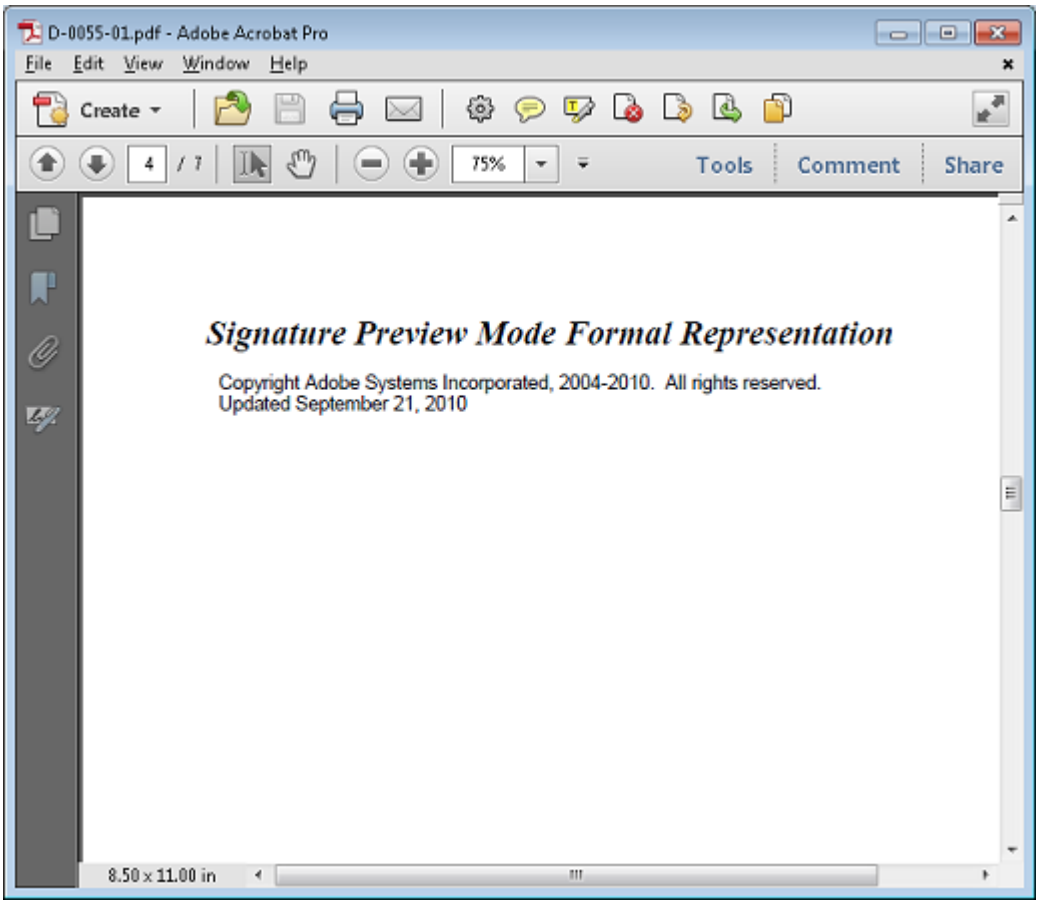


Figure 199

Insert Page from another File

The first time in session you may be required to log into Cabinet Explorer where you will be greeted by a login screen.

From the Adobe tool menu bar select the 'Insert Page from another File' icon:-

The Attach References: Select Document window is displayed. Select the document you wish to insert into the PDF.

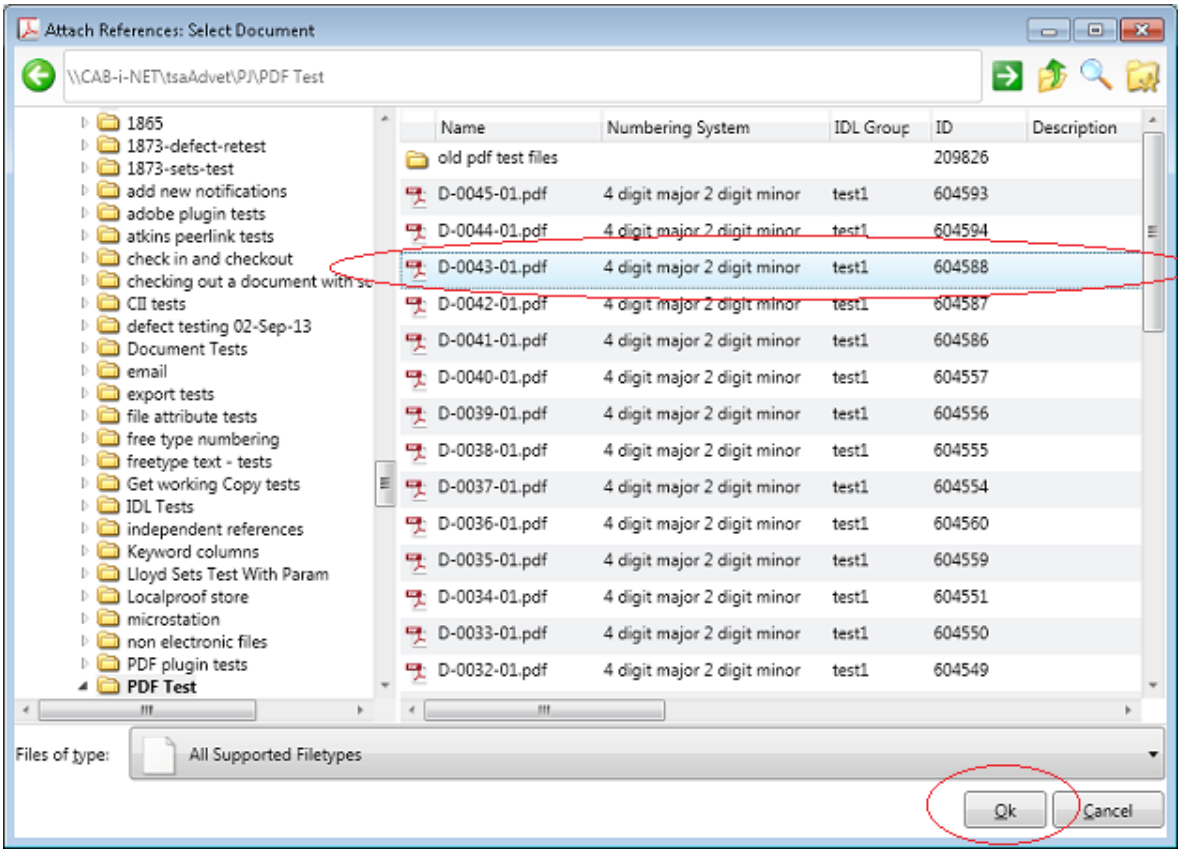


Figure 200

Once the document you want to insert into the PDF has been selected click on the OK button, the Insert Pages dialog box will be displayed.

You have multiple choices where you would like to insert the selected file, these are as follows:-

The Location has a drop down box where you have two options: After or Before.

You also have the Page options these are: First, Last or Page number.

If you are happy with the default choice then just click on the OK button, otherwise select your own preferences.

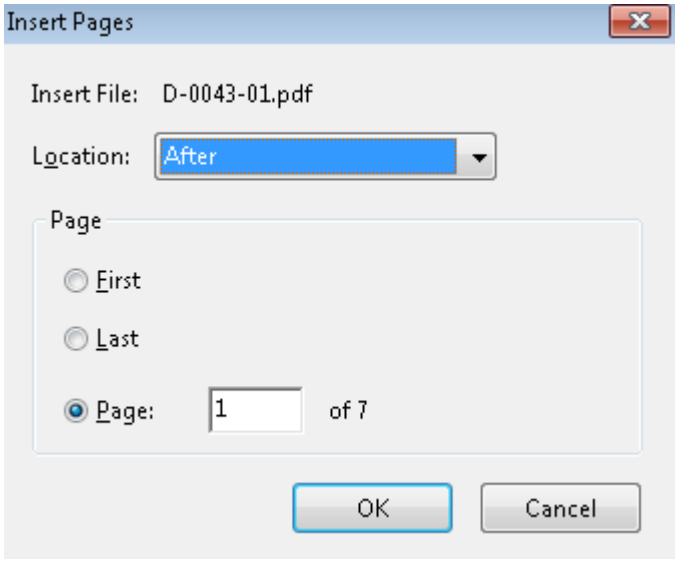


Figure 201

Once you have successfully inserted the file of your choice click on the OK button. The document is successfully inserted into the PDF document.

Replace a File

If you wish to replace a file/page click on the 'Replace' icon on the toolbar:-

The Adobe 'Attach References' dialog box will be displayed from the list of files/documents select the one you wish to use to replace a page within the PDF document you have open.

Once you have selected the document click on the OK button.

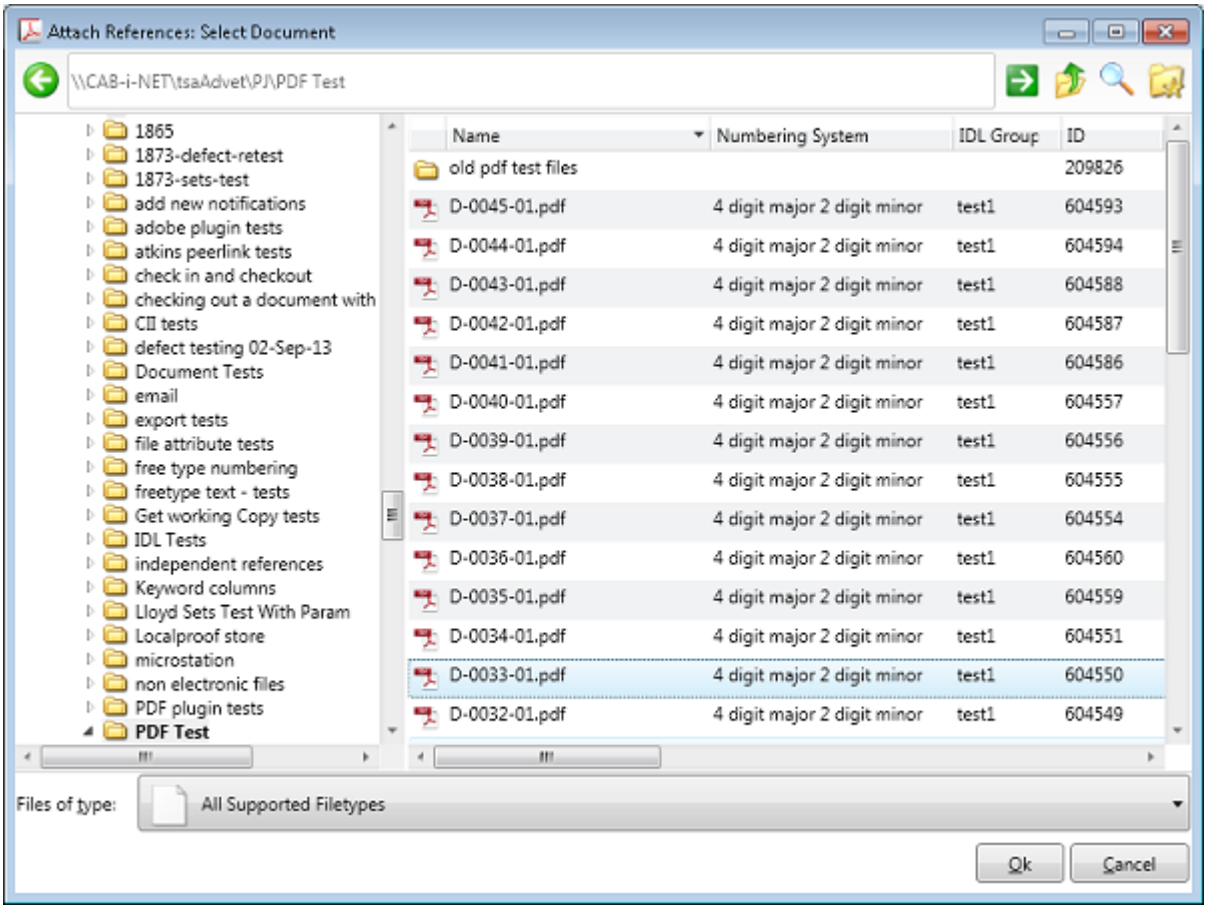

Attach References: Select Document
\\CAB-i-NET\tsaAdvet\PJ\PDF Test
1865
1873-defect-retest
1873-sets-test
add new notifications
adobe plugin tests
atkins peerlink tests
check in and checkout
checking out a document with
CII tests
defect testing 02-Sep-13
Document Tests
email
export tests
file attribute tests
free type numbering
freetype text - tests
Get working Copy tests
IDL Tests
independent references
Keyword columns
Lloyd Sets Test With Param
Localproof store
microstation
non electronic files
PDF plugin tests
PDF Test
Name
Numbering System
IDL Group
ID
old pdf test files
209826
D-0045-01.pdf 4 digit major 2 digit minor test1 604593
D-0044-01.pdf 4 digit major 2 digit minor test1 604594
D-0043-01.pdf 4 digit major 2 digit minor test1 604588
D-0042-01.pdf 4 digit major 2 digit minor test1 604587
D-0041-01.pdf 4 digit major 2 digit minor test1 604586
D-0040-01.pdf 4 digit major 2 digit minor test1 604557
D-0039-01.pdf 4 digit major 2 digit minor test1 604556
D-0038-01.pdf 4 digit major 2 digit minor test1 604555
D-0037-01.pdf 4 digit major 2 digit minor test1 604554
D-0036-01.pdf 4 digit major 2 digit minor test1 604560
D-0035-01.pdf 4 digit major 2 digit minor test1 604559
D-0034-01.pdf 4 digit major 2 digit minor test1 604551
D-0033-01.pdf 4 digit major 2 digit minor test1 604550
D-0032-01.pdf 4 digit major 2 digit minor test1 604549
Files of type:
All Supported Filetypes
Ok
Cancel

Figure 202

The 'Replace Pages' window is displayed (see next page).

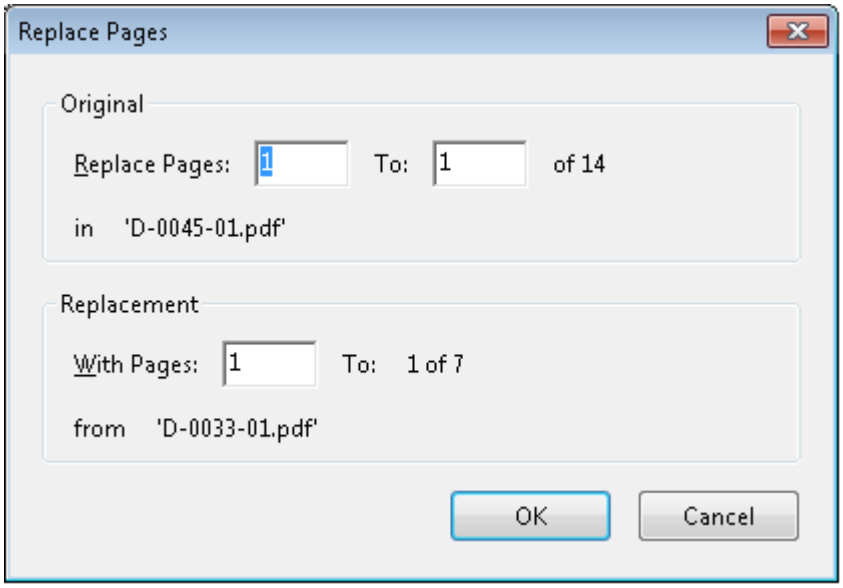


Figure 203

Once you have decided which page to replace click on the OK button and a confirmation of replacing page(s) window will be displayed (see below). Click on the Yes button to continue.

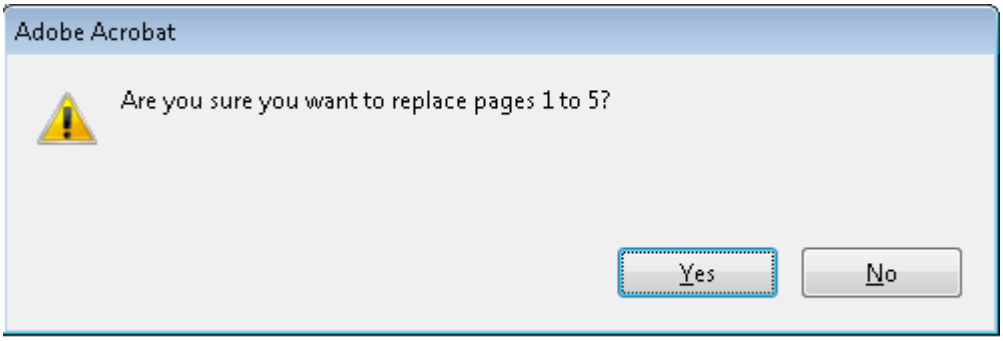


Figure 204

Once the page has been replaced, the PDF document will update automatically with the new page(s) content.